R. F. P. NUMBER: 8818

RELEASE DATE: FEBRUARY 8, 2001

PRE-SUBMITTAL VENDOR CONFERENCE: FEBRUARY 21, 2001

CLOSING DATE AND TIME: PROPOSALS SHALL BE SUBMITTED NOT LATER THAN 5:00 PM,

PST on March 7, 2001

Request for Proposals

County E-Government Services Strategic Action Plan

1.0 Introduction and Purpose

1.1 Placer County is one of the fastest growing counties in California. In addition to its many new residents, the county's business community is growing with the addition of many new or relocating companies, including technology firms. Acknowledging the impacts and the nature of this rapid growth, the County's Board of Supervisors and County Executive Office goals are to maintain a high level of service delivery and "customer" satisfaction, to remain fiscally sound, and to retain the outstanding quality of life which makes Placer County an attractive residential and business location.

Just as the business world changes rapidly in response to technological advancements, the Placer County Executive Office supports the adoption of new technologies to improve the way it delivers county services and information to county residents, business owners, and visitors, all county "customers."

Placer County intends to use online technologies as a business tool, to give county customers access to county information and services 7 days a week, 24 hours a day, from their homes, their offices, and from public facilities like city and county libraries and other public buildings. Along with improved access to services and timely, accurate information, this will allow the county to achieve economies in service delivery. In addition to these benefits, online access to government information and services reduces the number of vehicle trips to county offices, reducing traffic congestion and improving air quality. Placer County's e-government services must be monitored, maintained, and available essentially 24 hours a day, 7 days a week.

The Placer County Public Information Office – the PIO – manages the county Web site. In 1996, the PIO and the IT manager led an ad hoc group of county department representatives to plan the county's official Web site, based on county and department goals. The group helped the PIO select a Web developer. The PIO and the developer designed the county site, which was launched in 1997. In 1999, the PIO added a staff member whose job included managing the Web site and working with departments to identify their needs and, as time and resources permitted, to implement additional services and information. From March, 1999, the site grew

rapidly in size from 150 pages to over 1,300 pages, and the number of visitors increased from less than 10 to roughly 5,000 visitors each week.

The county's Web site, which is hosted out-of-house by a commercial ISP, acts as the portal for all county online information and services. The site has a consistent "look and feel," pages use a template, and Web authors follow a "policies and practices" document and a style guide. Some departments (e.g. the Treasurer/Tax Collector's office, the Sheriff's Office) have staff trained to maintain their own Web pages. However, the PIO provides Web maintenance, development and help-desk support for most departments.

The County is also in the early stages of planning an intranet. An intranet will assure that employees have up-to-date and accurate information to assist customers more completely and more swiftly, and will provide critical personnel and other administrative information. The intranet will complement and support Web-based services.

1.2 To assure the most effective use of county resources and continued progress, the County Executive Office seeks a consultant to assist it in developing a strategic plan for e-government services delivered using evolving technologies like the Internet, the Web, an intranet, and other communications tools. The strategic plan must include a conceptual model of the county's e-government services technology and resource needs based on County goals, objectives and priorities, and a work plan to guide staff efforts over the next 24-36 months.

In preparing the strategic plan, the successful consultant will consider:

- ♦ The county's current Web site
- The needs identified by county departments to use online services to meet their goals
- ♦ The needs of county residents, business owners and visitors, as identified by department staff who currently serve these "customers"
- ♦ The e-government services the business tools to enable the county to meet its goals
- Current and planned technical environment and security standards.

Based on that information and on technical development requirements, the consultant will develop the conceptual model, identifying technologies necessary to deliver e-government services and recommending their order of implementation; and will identify functional and business requirements to implement them. The consultant will also identify issues concerning and make recommendations on:

- ♦ Developing informational (static) material
- Developing interactive database query or data entry services
- Providing interactive or informational services to internal versus external customers
- ♦ The budget implications of the priorities for e-government services development and implementation.

2.0 Tasks

2.1 REVIEW BACKGROUND MATERIALS

Review and evaluate background materials in light of the county's goals for developing e-

government services. Materials will include:

- ♦ The county's Web site
- A description of how the PIO works with department staff to identify their needs
- ♦ Intranet Team Goals and Assumptions informal document
- ♦ County Web policies and practices document and the Web style guide
- ◆ The county feasibility study report (FSR) template (to provide common language for financial terms and formats)
- ♦ The current structure of and future plans for network and remote office site IT infrastructure and telecommunications development; and security standards
- County departments' preliminary lists of desired e-government services.

2.2 CONDUCT FACILITATED MANAGERS' NEEDS ASSESSMENT MEETINGS

Conduct up to four facilitated meetings for groups of county department heads and key staff to discuss and identify additional potential e-government services for their departments, to augment those already identified in prior discussions and communications with County Executive Office staff.

2.3 DEVELOP STRATEGIC PLAN AND WORK PLAN

The successful consultant will work with County Executive Office Public Information Office staff, supported by IT, to develop a strategic plan that incorporates stated County e-government goals, objectives and priorities, including a 24-36 month work plan with a conceptual model describing county e-government technical services, key projects, priorities, and resource needs. The consultant will develop the strategic plan considering the unique conditions in Placer County and the goals and needs identified by the County Executive Office and department staff, related to each question below. Provide specific recommendations.

2.3.1 To meet the goal of providing timely, accurate information and reliable online services, what are the financial and staff resources needed to maintain a Web site like the county's current site; and an intranet to meet the commonly-identified needs of a county government like Placer County's? How will financial and staffing resource needs increase as the Web site, e-government services, and the county intranet grow? Are there any synergies or resource savings to expect from simultaneous Web and intranet design, implementation and ongoing maintenance? What would be the impact of providing wireless access to e-government services? Prepare a recommendation on Placer County's need for an extranet.

E-government services will include but may not be limited to:

- ♦ One-way (static) forms
- ♦ Two-way (interactive) forms
- ♦ Fee-for-service transactions
- ♦ Streaming audio and video
- ♦ Business to government transactions
- ♦ Government to government transactions
- Discussion forums and email subscription lists

- ♦ Inquiry or database searches
- ♦ County documents publication
- Interactive phone systems which access county databases

Provide financial information using the terms and format outlined in the county's FSR, in Section III, C and D.

- 2.3.2 Should the county outsource any or all of the technology services required to provide its e-government services? If so, which technology services? Should the county outsource any or all of its intranet technology services?
- **2.3.3** What are the technical and operational information and database security issues which must be successfully addressed in the implementation and maintenance of the county's Web site, e-government services, and intranet?
- 2.3.4 What are the additional skill sets needed to develop, implement and maintain egovernment services which access multiple databases, such as GIS data, land use permitting information, and property tax data? If there are distinctions between expertise needed to develop intranet database-access services for employees and that needed to develop database-access services for external county clients, identify them. What are recommendations on training so department staff may successfully use the egovernment services Placer County intends to develop?
- 2.3.5 What is the most effective way to identify e-government technical services consultants? What are the specific criteria necessary to execute effective contracts for e-government technical services? Include criteria which allow flexibility to accommodate rapidly changing technologies, and recommend a tiered pricing structure for technical services ranging from simple to complex.
- **2.3.6** Considering recommendations on the areas listed above, what are proven effective methods, using automated data gathering whenever possible, which Placer County can use to measure and evaluate e-government services use, compared to traditional methods of service delivery?
- 2.3.7 What are the design and functional requirements Placer County must consider in planning and implementing e-government services, in light of current or anticipated e-government regulation at the federal and state level? Consider the Americans with Disabilities Act, the Freedom Of Information Act, privacy considerations, and other potential areas of impact currently under discussion in the industry.
- **2.3.8** Given Placer County's current Web site use, provide recommendations to market and promote new e-government services to county residents, business customers, and visitors. Include recommendations for internal marketing strategies for the Web site, intranet, and other e-government services.

2.4 PREPARE E-GOVERNMENT FINANCE MODEL

Recommend a detailed 3-year model identifying financial and staff resources needed to develop, implement and maintain Placer County's Web site information and e-government services, intranet, and a possible extranet. Presume this information will be incorporated into FSRs for further e-government services development. Provide financial information using the terms and format outlined in the county's FSR template, in Section III, C and D.

2.5 Prepare Draft and Final Recommendations

- 2.5.1 No later than 4 weeks after contract approval, provide a comprehensive draft strategic action plan and report. After County Executive Office review and approval, provide a final comprehensive action plan with findings, conclusions, and recommendations for implementation. The plan will need to identify clearly that the project was a cooperative venture by County Executive Office and IT managers, department heads, and the consultant. The plan will be provided in hard copy and in electronic form, in Word 97.
- 2.5.2 The plan will include an executive summary and background section outlining the approach, process, and rationale for the report. Separate sections of the plan will be prepared for each of the major work areas: The county Web site and e-government services, the intranet, and an extranet operational, organizational, staffing, training, automation, facilities, budgeting, disaster recovery/business continuity, and legal, as follows:
 - **♦** Findings
 - **♦** Recommendations
 - ♦ Steps required for implementation, including recommendations for phased implementation
 - ♦ Finance model

2.6 Assist in Preparation of Plan Recommendations

Prepare a draft electronic presentation summary, compatible with PowerPoint 97, of the plan recommendations and options for the County Executive Office. Based on CEO response to the draft presentation, prepare a final electronic presentation summary. The County Executive Office will then determine whether the consultant or County CEO staff will make subsequent presentations to the Board of Supervisors.

3.0 PROJECT BUDGET

The project budget is in the \$50,000 to \$60,000 range, including a contingency.

4.0 PROJECT SCHEDULE

It is the County's expectation that the scope of work would be completed and a draft report submitted for County staff review no later than 4 weeks after the contract is signed; and a final draft submitted no later

than 6 weeks after the contract is signed.

5.0 MEETINGS AND SCHEDULE

The Consultant will develop a detailed project schedule including all proposed meetings and will schedule meetings with the County Executive Office and IT staff to review key project issues and deliverables; and facilitated meetings with county department heads. The Consultant <u>may</u> also be requested present the final report in summary form to the Board of Supervisors.

6.0 Proposed Format

- **6.1** A qualifying proposal must not exceed 20 pages, including attachments, and must address all of the following points in the following order:
- **6.2** A cover letter signed by a representative of the firm who has the authority to commit to a contract
- **6.3** A brief description of the consultant's firm and a statement of the firm's qualifications for performing the subject consulting services
- **6.4** Previous successful experience working with similar projects for other counties, preferably with California counties
- **6.5** A proposed work plan and time schedule reflecting each of the project phases and work products, identifying appropriate progress checkpoints and interim products
- **6.6** An organizational chart depicting the project team proposed by the firm and a brief summary of the qualifications and experience of each team member, including length of service with the firm and resumé documenting experience with similar projects with other counties, preferably with California counties
- **6.7** Those portions, if any, of the total project for which your firm will require the services of subcontract consulting firms, and a detailed description of those sub-consultant(s) as required in Items 6.2 through 6.5, above
- **6.8** A list of references for similar projects, including contact person and phone number. The results of reference checks may affect the final award
- **6.9** A total, not-to-exceed cost proposal based on an all-inclusive flat fee. Include a cost breakdown by task, hours, and billing rates for each member of the project team. Sub-consultant fees and all other direct and indirect costs shall be included in the cost proposal.
- **6.10** A statement of assurances regarding the following: Designated project team (Section 7.0), conflict of interest (Section 11.0), insurance and indemnification requirements (Section 9.5), and Affidavit of Eligibility for Local Vendor Preference, if applicable (Section 9.4). Note that actual Certificates of Insurance are not required as a part of the firm's submittal.

7.0 ASSURANCE OF DESIGNATED PROJECT TEAM

In order to assure that the designated project team is used for the project, reassignment of, or substitution for, any member of the designated project team, without prior approval of the County, shall be grounds for cancellation of the contract at the option of the County.

8.0 Proposal Submittal

- **8.1** Ten (10) copies of the proposal shall be received no later than 5:00 p.m. on the date shown on the first page of this RFP at the Placer County Procurement Division, 2964 Richardson Drive, DeWitt Center, Auburn, CA 95603.
- **8.2** All proposals shall be submitted in a sealed envelope, which is clearly marked with the RFP number and the title of the RFP.
- **8.3** Late proposals will not be accepted under any circumstances.
- **8.4** All proposals, whether selected or not, shall become the property of Placer County.
- **8.5** Cost of preparation of proposals shall be borne by the consultants.
- **8.6** Proposals shall be signed by an authorized employee or officer of the company in order to receive consideration.
- **8.7** The County will not be responsible for proposals delivered to a person/location other than that specified herein.
- **8.8** Fax, telephone, email, or telegraphic proposals will not be accepted.

9.0 EVALUATION CRITERIA

- **9.1** A County selection panel will review the proposals for completeness, responsiveness, and benefit to the County. One or more of the top-ranked firms <u>may</u> be invited for interviews prior to final selection to allow for further elaboration of their proposal. The proposed project manager will represent the firm at the interview, if required. The County reserves the right to select the most qualified firm based solely on the written proposal, without conducting interviews.
- 9.2 The top three firms will be identified in ranked order and the firm considered to have presented the most advantageous proposal will be recommended to the County Executive Officer. Upon the final review by the County Executive Office, the top firm will be recommended to the Board of Supervisors. The County reserves the right to award a contract to the firm or individual that presents the proposal which, in the sole judgment of the County, best accomplishes the desired results. The County also reserves the right to reject any or all

proposals, to waive minor irregularities, or to negotiate minor deviations with the successful firm.

9.3 A selection committee will evaluate and select the most highly qualified firm based on the following criteria:

Evaluation Criteria:	Weight
Qualifying background and experience of firm and personnel, sub-	50%
consultants, describing successful experience with similar projects,	
and reference checks; and documented familiarity with California	
county organization and operation	
Proposed methodology to accomplish objectives	40%
Cost	10%
Total	100%

- 9.4 Pursuant to existing Placer County policy, a five percent (5%) preference will be awarded to Placer County firms responding to this RFP. The five percent credit will be added to the submitting firm's aggregate score during the evaluation process. Firms requesting this credit must submit an Affidavit of Eligibility with their Statement Of Qualifications. Preference criteria and affidavit forms are available via a "fax on demand" system by calling 530-889-7776, option 4, and entering your full fax number, including the "1" and your area code if different from 530, and following the instructions for faxing. Affidavit forms are also available on the Placer County Web site (http://www.placer.ca.gov/admin/procurement/pdf/local-vendor-preference.pdf).
- **9.5** The firm selected pursuant to this RFP shall enter into a contract subsequent to the successful conclusion of contract negotiations with County staff. A copy of the anticipated contract, including insurance coverage requirements, is included as Attachment A. Consultants shall include a statement in their proposal that these requirements will be fulfilled (See Section 6.10)

10.0 PROTESTS AND APPEALS

Any actual or prospective consultant, offeror or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the Director of Administrative Services. The protest shall be submitted in writing to the Director of Administrative Services within seven (7) working days after such aggrieved person or company knows, or should have known, of the facts giving rise thereto.

11.0 CONFLICT OF INTEREST

Consultants shall warrant and covenant that no official or employee of the County, nor any business entity in which an official of the County has an interest, has been employed or retained to solicit or aid in the procuring of the resulting contract, nor that any such person will be employed in the performance of such contract without immediate divulgence of such fact to the County. (See Section 6.10)

12.0 INQUIRIES

Direct all inquiries regarding the RFP process or proposal submissions to:

Bill Davis, Purchasing Manager Placer County Procurement Division 2964 Richardson Drive, DeWitt Center Auburn, CA 95603 530-889-4254

Direct all inquiries regarding the Objectives or the Scope of Work in writing (preferably by email) to:

Susan Prince

Placer County Public Information Office 175 Fulweiler Avenue Auburn, CA 95603 sprince@placer.ca.gov

The County will hold a vendor conference from 1 to 2:30 PM on February 21, 2001 in the CEO Conference Room 1, 175 Fulweiler Avenue, Auburn, CA to accept questions regarding this RFP. Answers will be provided in writing, after the conference.

13.0 ATTACHMENTS

- A. Consultant Services Agreement sample
- B. Documentation on how the PIO works with department staff to identify their online needs
- C. County departments' preliminary lists of desired e-government services
- D. County Web Policies & Practices
- E. Placer County Web Style Guide
- F. Intranet Team Goals and Assumptions informal document
- G. County feasibility study report (FSR) template
- H. Current structure of and future plans for network and remote office site IT infrastructure and telecommunications development
- I. Standards required for access to the county data network
- J. Security standards for the county data network
- K. County's software list as of 1/01
- L. Information Systems Master Plan (Teleservices) (excerpt from County IT 2000 Plan)

Project:
Administering Agency:
Contract No.
Contract Description:
CONSULTANT SERVICES AGREEMENT
THIS AGREEMENT is made at Auburn, California, as of
1. <u>Services</u> . Subject to the terms and conditions set forth in this Agreement, Consultant shall provide the services described in Exhibit A. Consultant shall provide said services at the time, place, and in the manner specified in Exhibit A.
2. Payment . County shall pay Consultant for services rendered pursuan to this Agreement at the time and in the amount set forth in Exhibit B. The payment specified in Exhibit B shall be the only payment made to Consultant for services rendered pursuant to this Agreement. Consultant shall submit all billings for said services to County in the manner specified in Exhibit B; or, if no manner be specified in Exhibit B then according to the usual and customary procedures which Consultant uses for billing clients similar to County.
3. Facilities, Equipment and Other Materials, and Obligations o
<u>County</u> . Except as set forth in Exhibit C, Consultant shall, at its sole cost and expense furnish all facilities, equipment, and other materials which may be required for furnishing

4. <u>General Provisions</u>. The general provisions set forth in Exhibit D are part of this Agreement. Any inconsistency between said general provision and any other terms or conditions of this Agreement shall be controlled by the other term or condition insofar as it is inconsistent with the general provisions.

services pursuant to this Agreement. County shall furnish Consultant only those facilities, equipment, and other materials, and shall perform those obligations listed in

Exhibit C according to the terms and conditions set forth in Exhibit C.

5. **Exhibits.** All exhibits referred to herein are attached hereto and by this reference incorporated herein.

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6.	Time for Performance.	Time is of the essence, and, subject to
failure of Cor		the provisions of paragraph 3 of Exhibit D, s within the time limits set forth in Exhibit A act.
Execu	ted as of the day first above sta	ated:
		COUNTY OF PLACER
	Ву:	Chief Executive Officer
		CONSULTANT*
	By: Name: Title:	President/ Vice President
	By: Name: Title:	Secretary
Approved As	to Form	
County Couns	sel	

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^{*}Agreement must be signed by two corporate officers if a corporation; one <u>must</u> be the secretary of the corporation, and the other may be either the President or Vice President, <u>unless</u> an authenticated corporate resolution is attached delegating authority to a single officer to bind the corporation.

EXHIBIT A

SCOPE OF SERVICES

EXHIBIT B

PAYMENT FOR SERVICES RENDERED

Service Rate:

EXHIBIT C

FACILITIES, EQUIPMENT, AND OTHER MATERIALS, AND OBLIGATIONS OF COUNTY

(Specify all equipment and facilities to be provided or made available by County, and any other County obligations.)

EXHIBIT D

GENERAL PROVISIONS

- 1. <u>Independent Contractor</u>. At all times during the term of this Agreement, Consultant shall be an independent contractor and shall not be an employee of the County. County shall have the right to control Consultant only insofar as the results of Consultant's services rendered pursuant to this Agreement. County shall not have the right to control the means by which Consultant accomplishes services rendered pursuant to this Agreement.
- 2. <u>Licenses, Permits, Etc.</u> Consultant represents and warrants to County that it has all licenses, permits, qualifications, and approvals of whatsoever nature which are legally required for Consultant to practice its profession. Consultant represents and warrants to County that Consultant shall, at its sole cost and expense, keep in effect or obtain at all times during the term of this Agreement, any licenses, permits, and approvals which are legally required for Consultant to practice its profession at the time the services are performed.
- 3. <u>Time</u>. Consultant shall devote such time to the performance of services pursuant to this Agreement as may be reasonably necessary for the satisfactory performance of Consultant's obligations pursuant to this Agreement. Neither party shall be considered in default of this Agreement to the extent performance is prevented or delayed by any cause, present or future, which is beyond the reasonable control of the party.
- **4.** <u>Insurance.</u> Consultant shall file with County a Certificate of Insurance, with companies acceptable to County, with a Best's Rating of no less than A:VII showing the following coverage:
 - A. Workers' Compensation and Employers' Liability Insurance
- 1) Workers' Compensation Insurance shall be provided, as required, by any applicable law or regulation. Employers' liability insurance shall be provided in amounts not less than five hundred thousand dollars (\$500,000) each accident for bodily injury by accident, five hundred thousand dollars (\$500,000) policy limit for bodily injury by disease, and five hundred thousand dollars (\$500,000) each employee for bodily injury by disease.
- 2) If there is an exposure of injury to Consultant's employees under the U.S. Longshoremen and Harbor Workers' Compensation Act, the Jones Act, or under laws, regulations or statutes applicable to maritime employees, coverage shall be included for such injuries or claims.
- 3) Each Workers' Compensation policy shall be endorsed with the following specific language:

Cancellation Notice "This policy shall not be canceled or materially changed without first giving thirty (30) days' prior written notice to the County."

4) Consultant shall require all SUBCONSULTANTS to maintain adequate Workers' Compensation Insurance. Certificates of Workers Compensation shall be filed forthwith with the County upon demand.

B. <u>General Liability Insurance</u>

- 1) Comprehensive General Liability or Commercial General Liability insurance shall be provided covering all operations by, or on behalf of Consultant, covering bodily injury liability and property damage liability for the limits of liability indicated below and including coverage for contractual liability insuring the obligations assumed by Consultant in this Agreement.
 - 2) One of the following forms is required:
 - a) Comprehensive General Liability;
 - b) Commercial General Liability (Occurrence); or
 - c) Commercial General Liability (Claims Made).
- 3) If Consultant carries a Comprehensive General Liability policy, the limits of liability shall not be less than a Combined Single Limit for bodily injury, property damage, and Personal Injury Liability of:
 - a) One million dollars (\$1,000,000) each occurrence;
 - b) One million dollars (\$1,000,000) aggregate.
 - 4) If Consultant carries a Commercial General Liability (Occurrence) policy:
 - a) The limits of liability shall not be less than:
 - i) One million dollars (\$1,000,000) each occurrence (combined single limit for bodily injury and property damage);
 - ii) One million dollars (\$1,000,000) for Products-Completed Operations;
 - iii) One million dollars (\$1,000,000) General Aggregate.
 - b) If the policy does not have an endorsement providing that the General Aggregate Limit applies separately to this contract, or if defense costs are included in the aggregate limits, then the required aggregate limits shall be two million dollars (\$2,000,000).
 - 5) Special Claims Made Policy Form Provisions:

Consultant shall not provide a Commercial General Liability (Claims Made) policy without the express prior written consent of County, which consent, if given, shall be subject to the following conditions:

a) The limits of liability shall not be less than:

- i) One million dollars (\$1,000,000) each occurrence (combined single limit for bodily injury and property damage);
- ii) One million dollars (\$1,000,000) aggregate for Products-Completed Operations;
- iii) One million dollars (\$1,000,000) General Aggregate.
- b) The insurance coverage provided by Consultant shall contain language providing coverage up to six (6) months following the completion of the contract in order to provide insurance coverage for the hold harmless provisions herein if the policy is a claims made policy.

C. Endorsements:

Each Comprehensive or Commercial General Liability policy shall be endorsed with the following specific language:

- 1) "The County, its officers, agents, employees and volunteers, and the County of Placer, its officers, agents, employees and volunteers, are to be covered as insureds for all liability arising out of operations, or on behalf of, the named insured in the performance of this Agreement."
- 2) "The insurance provided by the Consultant, including any excess liability or umbrella form coverage, is primary coverage to the County with respect to any insurance or self-insurance programs maintained by County, and no insurance held or owned by County shall be called upon to contribute to a loss."
- 3) "This policy shall not be canceled or materially changed without first giving thirty (30) days' prior written notice to County."

D. <u>Automobile Liability Insurance</u>

- 1) Automobile Liability insurance shall be provided covering bodily injury and property damage in an amount no less than one million dollars (\$1,000,000) combined single limit for each occurrence.
 - 2) Covered vehicles should include owned, non-owned, and hired automobiles/trucks.

E. Professional Liability Insurance (Errors and Omissions)

- 1) Professional Liability Insurance for Errors and Omissions coverage shall be provided in the amount of not less than two million dollars (\$2,000,000) in aggregate.
- 2) The insurance coverage provided by Consultant shall contain language providing coverage up to six (6) months following the completion of the contract in order to provide insurance coverage for the hold harmless provisions herein if the policy is a claims made policy.
- **5.** <u>Indemnity.</u> Consultant hereby agrees to protect, defend, indemnify, and hold the County free and harmless from any and all losses, claims, liens, demands, and

causes of action of every kind and character including, but not limited to, the amounts of judgments, penalties, interest, court costs, legal fees, and all other expenses incurred by the County arising in favor of any party, including claims, liens, debts, personal injuries, death, or damages to property (including employees or property of the County) and without limitation by enumeration, all other claims or demands of every character occurring or in any way incident to, in connection with or arising directly or indirectly out of this contract or agreement. Consultant agrees to investigate, handle, respond to, provide defense for, and defend any such claims, demand, or suit at the sole expense of the Consultant. Consultant also agrees to bear all other costs and expenses related thereto, even if the claim or claims alleged are groundless, false, or fraudulent. This provision is not intended to create any cause of action in favor of any third party against Consultant or the County or to enlarge, in any way, the Consultant's liability but is intended solely to provide for indemnification of the County from liability for damages or injuries to third persons or property arising from Consultant's performance pursuant to this contract or agreement.

As used above, the term "County" means Placer County or its officers, agents, employees and volunteers.

- **6.** <u>Consultant Not Agent</u>. Except as County may specify in writing, Consultant shall have no authority, express or implied, to act on behalf of County in any capacity whatsoever as an agent. Consultant shall have no authority, express or implied, pursuant to this Agreement to bind County to any obligation whatsoever.
- **7.** <u>Assignment Prohibited</u>. Consultant may assign its rights and obligations under this Agreement only upon the prior written approval of County, said approval to be in the sole discretion of County.

8. <u>Personnel</u>.

- A. Consultant shall assign only competent personnel to perform services pursuant to this Agreement. In the event that County, in its sole discretion, at any time during the term of this Agreement, desires the removal of any person or persons assigned by Consultant to perform services pursuant to this Agreement, including those members of the Project Team as explained below, Consultant shall remove any such person immediately upon receiving notice from County of the desire of County for removal of such person or persons.
- B. Notwithstanding the foregoing, if specific persons are designated as the "Project Team" in Exhibit A, Scope of Services, Consultant agrees to perform the work under this agreement with those individuals identified. Reassignment or substitution of individuals or subconsultants named in the Project Team by Consultant without the prior written consent of County shall be grounds for cancellation of the agreement by County, and payment shall be made pursuant to Paragraph 10 <u>Termination</u> only for that work performed by Project Team members.

9. <u>Standard of Performance</u>. Consultant shall perform all services required pursuant to this Agreement in the manner and according to the standards observed by a competent practitioner of the profession in which Consultant is engaged in the geographical area in which Consultant practices its profession. All products of whatsoever nature which Consultant delivers to County pursuant to this Agreement shall be prepared in a substantial first class and workmanlike manner and conform to the standards or quality normally observed by a person practicing in Consultant's profession.

10. Termination.

- A. County shall have the right to terminate this Agreement at any time by giving notice in writing of such termination to Consultant. In the event County shall give notice of termination, Consultant shall immediately cease rendering service upon receipt of such written notice, pursuant to this Agreement. In the event County shall terminate this Agreement:
- 1) Consultant shall deliver copies of all writings prepared by it pursuant to this Agreement. The term "writings" shall be construed to mean and include: handwriting, typewriting, printing, photostating, photographing, and every other means of recording upon any tangible thing any form of communication or representation, including letters, words, pictures, sounds, or symbols, or combinations thereof.
- 2) County shall have full ownership and control of all such writings delivered by Consultant pursuant to this Agreement.
- 3) County shall pay Consultant the reasonable value of services rendered by Consultant to the date of termination pursuant to this Agreement not to exceed the amount documented by Consultant and approved by County as work accomplished to date; provided, however, that in no event shall any payment hereunder exceed the amount of the agreement specified in Exhibit B, and further provided, however, County shall not in any manner be liable for lost profits which might have been made by Consultant had Consultant completed the services required by this Agreement. In this regard, Consultant shall furnish to County such financial information as in the judgment of the County is necessary to determine the reasonable value of the services rendered by Consultant. The foregoing is cumulative and does not affect any right or remedy which County may have in law or equity.
- B. Consultant may terminate its services under this Agreement upon thirty (30) working days advance written notice to the County.
- 11. <u>Non-Discrimination</u>. Consultant shall not discriminate in its employment practices because of race, religious creed, color, national origin, ancestry, physical handicap, medical condition, age, marital status, or sex in contravention of the California Fair Employment and Housing Act, Government Code section 12900 <u>et seq</u>.

- 12. Records. Consultant shall maintain, at all times, complete detailed records with regard to work performed under this agreement in a form acceptable to DISTRICT, and DISTRICT shall have the right to inspect such records at any reasonable time. Notwithstanding any other terms of this agreement, no payments shall be made to CONSULTANT until DISTRICT is satisfied that work of such value has been rendered pursuant to this agreement. However, DISTRICT shall not unreasonably withhold payment and, if a dispute exists, the withheld payment shall be proportional only to the item in dispute.
- **13.** Ownership of Information. All professional and technical information developed under this Agreement and all work sheets, reports, and related data shall become the property of County, and Consultant agrees to deliver reproducible copies of such documents to County on completion of the services hereunder. The County agrees to indemnify and hold Consultant harmless from any claim arising out of reuse of the information for other than this project.
- **14.** <u>Waiver</u>. One or more waivers by one party of any major or minor breach or default of any provision, term, condition, or covenant of this Agreement shall not operate as a waiver of any subsequent breach or default by the other party.
- 15. <u>Conflict of Interest</u>. Consultant certifies that no official or employee of the County, nor any business entity in which an official of the County has an interest, has been employed or retained to solicit or aid in the procuring of this agreement. In addition, Consultant agrees that no such person will be employed in the performance of this agreement without immediately notifying the County.
- **16.** Entirety of Agreement. This Agreement contains the entire agreement of County and Consultant with respect to the subject matter hereof, and no other agreement, statement, or promise made by any party, or to any employee, officer or agent of any party which is not contained in this Agreement shall be binding or valid.
- 17. <u>Attorney's Fees.</u> If any party to this Agreement commences legal proceedings to enforce any of its terms or for damages for its breach, the prevailing party shall be entitled to recover reasonable attorney's fees, including those incurred on appeal, if any.
- **18.** Governing Law. This Agreement is executed and intended to be performed in the State of California, and the laws of that State shall govern its interpretation and effect. Any legal proceedings on this agreement shall be brought under the jurisdiction of the Superior Court of the County of Placer, State of California, and Consultant hereby expressly waives those provisions in California Code of Civil Procedure §394 that may have allowed it to transfer venue to another jurisdiction.

How the PIO Identifies Department E-Government Needs

To identify department Web or e-government needs, the Public Information Office staff meets with the department head and any staff he or she designate. They discuss department services currently provided by traditional means, in person or by phone, for example, and Web-based alternatives. The PIO staff collects information in the areas listed below, for the Web services database.

Whenever possible, the PIO staff creates the simple Web pages, forms, and PDF documents a department requests. The department provides the content and the PIO staff prepares a draft from that material and confirms its accuracy with department staff. When the pages or documents are approved, the PIO staff posts the material on the county Web site, adding the appropriate links.

In all cases, department management and staff are considered the experts regarding online or Web content. PIO staff provide assistance in conveying Web content to the public in a method appropriate to the medium of the Web; and technical assistance in creating Web pages, PDF documents, or other online content.

LIST OF DATABASE FIELDS WITH INFORMATION ON DEPARTMENT-REQUESTED WEB/E-GOVERNMENT SERVICES

Field Name	Data Type	Description
ID Tield Hamie	AutoNumber	DOSCIPCION .
Date	Date/Time	Update date
Date of request	Date/Time	Original meeting date or date of dept. request
Department	Text	Department name
Web info/service	Text	Name of Web information or service
Needs	Memo	Elements of information or service, what dept. and Web staff need to do
Priority	Number	Priority of service or information
Authorizing staff	Text	Name of dept. staff member to approve content, final material to post
Back-up staff	Text	Name of back-up dept. staff member
Summary of purpose	Memo	Statement summarizing purpose of information or service to be provided
Target market	Text	Intended users of the information or service
Update frequency	Text	Frequency with which page content must be updated
Staff to update	Text	Name of staff person responsible to update page
Phased implementation	Text	Can implementation be phased?
Due date	Text	Date by which service or information must be provided
Type of due date	Text	External or internal due date
Accessibility needs	Text	Special accessibility needs for users with physical disabilities
Legal/policy/confidential?	Memo	Any legal or policy implications or questions, or confidentiality issues concerning service or information
Review with County Counsel	Text	Yes/no, if "yes" then includes date of review
Outside consultant	Text	Is outside consultant required for this project?
Bid required	Text	Is an outside bid required for this project?
Consultant hours	Number	Estimated number of consultant hours to complete project
Dept staff hours	Number	Estimated number of dept. staff hours to complete project
Web staff hours	Number	Estimated number of Web staff hours to complete project
Additional resources	Text	List of proposed new resources needed for project (e.g. new software, server)
Budget	Currency	Estimated cost of project
Status	Text	Project status
Final cost	Currency	Final cost on project
Notes	Memo	Internal notes on the project

Complete Web Projects Summary List

Air Pollution Control District

Project Create Web pages for district Status: Available

Needs: static Web page creation. District staff to provide content, Web staff to create and maintain

<u>Assessor</u>

Project Update main dept. Web page; add dept. FAQ and page of Status: Awaiting Approval

links to dept. downloadable forms

Needs: static Web pages, Word forms converted to PDF

<u>Auditor</u>

Project Refresh, update Dept. Web page Status: Available

Needs: Use layout similar to DA's page. Remove date, use pic budget cover for now, use pic of FAB

when the road is done. Add links to dept. services descriptions page, Dept. email addresses

page.

Project Page with dept. vision, mission, goals Status: Proposed

Needs: static Web page

Project Email feedback form Status: Proposed

Needs: response form emailed to dept. staff

Project Links to commonly-requested forms Status: Proposed

Needs: Do links to existing sites with forms; eventually add pages with county forms;. Need

Auditor's staff to identify needed forms

Building

Project Update Dept. Web page Status: Available

Needs: Update Web page, add Bill Schulze's email address

Project Web page(s) with Building Dept. Procedure Manual Status: Proposed

Needs: Create static introductory Web page with links; publish manual as PDF and probably as

HTML page, too.

Project Web page fact sheets on common projects Status: Proposed

Needs: static Web pages

Project Web page for county's third-party plan check Status: Proposed

Needs: Static Web page containing info. on program

Project Web page with dept. phone directory Status: Proposed

Needs: static Web page

Project Redesign dept. main page Status: In Development

Updated 02/06/2001 1 Public Information Office
County Executive Office

Needs: static Web page

Project Building permits online Status: Available

Needs: First, provide downloadable/printable forms online in PDF format. Eventually provide

interactive building permit forms, to dump online data into dept. database.

Project Weekly building permits issued report Status: Proposed

Needs: Create dept. Access database to track building permits issued, to create weekly report to

publish weekly on the Web

<u>CEO</u>

Project Post preliminary and, later, final budget information Status: Available

Needs: Static Web page providing general budget information and links to PDF files; convert Word

documents on budget to PDF files

Project Web pages with info on Placer County charter Status: Available

Needs: Static Web pages, "charter" directory and index.htm file for simple Web address

www.placer.ca.gov/charter; conversion of Word doc of charter to PDF file

CEO/OES

Project Update Y2K preparation page language for general Status: In Development

emergency-preparation use

Needs: Update static Web pages, table of contents page and links

CEO/PIO

Project Web training for county staff Status: Available

Needs: Basic training for staff in HoTMetaL Pro 4.0, WS_FTP LE, and in using county Web

template page.

Project Informal Web site training Status: Available

Needs: Show PIO staff how to create or maintain various sorts of Web pages and features in

person, by phone or online.

Project Web site maintenance Status: Available

Needs: Prepare new seasonal Web images, post images, do other general Web maintenance tasks

Project Redesign Web site (1999) Status: Available

Needs: Use consistent design throughout site, add navigation aids on each page, freshen

graphics/look, consider accessibility guidelines as part of redesign

Project Set up new search engine for site Status: Available

Needs: Identify search engine software, preferably free. Install and configure software on SVI

server for county Web site.

Project Customize Web site error page Status: Available

Needs: Create custom "error 404 page not found" Web page for county site. Work with SVI to post

custom page.

Project Post news releases, update "News" and "Current Status: Available

Issues" pages

Needs: Static Web pages with occasional links (mostly internal to site). Est. 10 min. staff time per

Project Meet with dept. heads and staff, and Web contractor Status: Available

Needs: Identify needed dept. e-government projects

Project Ability to email page content to someone. Status: Proposed

Needs: Create script & form to capture page content and title and stick it in an email message, to be

addressed by Web visitor. Post on Web site.

Project Redesign Web site (2001) Status: Proposed

Needs: "Freshen" look of site, use consistent design throughout site, keep navigation aids on each

page, consider accessibility guidelines as part of redesign, add better dept. access

Clerk of the Board

Project Web page listing commission or committee vacancies Status: Awaiting Approval

Needs: Create static Web page listing

Project Web pages for county committees and commissions Status: Available

Needs: 100+ static Web pages; table of contents page with links

Clerk/Recorder/Registrar

Project Poll worker application form Status: Available

Needs: PDF form at least, interactive form preferred.

Dept. staff to provide electronic version of form; Web staff to convert to PDF. Work with

dept. to create later interactive form, with Web consultant.

Project Provide election results information online real-time Status: Available

Needs: Needed for 3/00 election, all subsequent elections. Dept. staff to handle this.

Project Set up elections forms Status: Available

Needs: Create static forms; post forms.

Project Unzip election polling places file for elections Status: Available

Needs:

Updated 02/06/2001

Project Create page to access external database Status: Proposed

Needs: Contract w/vendor to continue providing access to County database using search program.

Create page on County's site to link to external database. Have vendor remove County seal

and credit card purchase information from his pages. Direct all purchase inquiries to

Project Campaign disclosure forms Status: Available

Needs: Post 460 forms as images, on multiple pages. State may require that candidate addresses &

other info. be recused, which can be done manually.

Dept. staff to provide electronic versions of statements. Web staff or consultant to convert

to HTML, create index page, post, and maintain.

Economic Development

Project Create marketing CD for county with Web links for Status: Available

dynamic information

Needs: Create interactive CD which will link to Web pages.

Project Create CalWORKs Web pages Status: Available

Needs: Static Web pages outlining different aspects of CalWORKs projects for 2 different target

audiences

Project "In Progress Online" email newsletter, including Web Status: Available

pages

Needs: Create template for text & HTML versions of online newsletter. Create introductory static

Web page, and static Web page for each newsletter

Facility Services

Project Create Web pages for county Vets Memorial Halls Status: Available

Needs: 8 static Web pages, plus introductory page w/links

Project Update dept. Web page Status: In Development

Needs: Static Web page(s), add email

Project Online reservations and permit applications for parks, Status: Proposed

Mem. Halls

Needs: Interactive online Web pages feeding into database

Project Online document library Status: Proposed

Needs: FTP or Web site with documents available for downloading, plus introductory page

Project Email newsletter service Status: Proposed

Needs: Set up one or more newsletters to which Web visitors could subscribe, based on their areas

of interest; create static introductory Web page describing newsletters with form for subscription. Phase project -- 1 newsletter at first, add newsletters. Set up archive for

newsletters with Web page of links.

Project Special Districts Web pages Status: In Development

Needs: Static Web pages with info. On a range of Special Districts topics

Film Office

Project Post online photos Status: Available

Needs: High-speed scanner or contract scanning project out, for initial scanning job of hundreds,

perhaps thousands of photos; scanner for adding pictures occasionally thereafter. Scan in photos, add written detail on photos. Develop system or organization for photos, create Web

pages, upload photos and other information to Web site.

Project Film office home page Status: Available

Needs: Create Web page

Project "Feature Box" on home page with links to video clips of Status: In Development

recent film events

Needs: Create box, get streaming video software, load video, upload pages and video

Project "Feature box" on film Web page to highlight current Status: Proposed

location needs, for public input

Needs: no special needs

Project Page identifying sites whose owners want to offer as Status: Proposed

locations

Needs: Create Web page

Project Online interactive county film/TV resources form Status: In Development

Needs: Online interactive form by which local film crew members, talent, vendors (e.g. restaurants,

hotels, rental companies) can update their info. in a film office database

Project Pages with info. on local film, crew talent, and other Status: Proposed

related resources

Needs: Create Web pages

Project County film permits, regulations and ratecard online Status: Available

Needs: Prepare PDF files for forms, rate card, regulations; cgi or other script eventually, for

interactive online forms; add online payment option, as soon as available.

Flood Control District

Project Web pages describing district activities, purpose Status: Available

Needs: Static Web pages

<u>HHS</u>

Project Prevention Unit / Odyssey forms online Status: Proposed

Needs: Convert forms in Word to PDF; create introductory Web page and links

Project Prevention Unit Web general and specific activities Status: Proposed

Needs: Create static Web pages on dept. activities overall, and "feature" pages on periodic activities

Project Web page(s) for PHCA program Status: Proposed

Needs: Web page with general info on services provided by PHCA program, and office or service

locations; possibly with links to related information

Project Create Web site for Placer Greater Collaborative Status: Available

organization

Needs: Create simple Web pages with some outside links; purchase Web domain name; set up

account with local ISP. Collaborative members to provide content, pay for site. Web staff to

LAFCO

Project Create LAFCO Web page, agenda and minutes pages Status: Available

Needs: Create static Web main page; convert agendas to HTML.

Commission staff to provide information in electronic form; Web staff to create and maintain

pages.

Library

Project 2 Web pages for adult literacy project Status: Available

Needs: Static Web pages, dept. staff to provide content; Web staff to create pages

<u>Museums</u>

Project Volunteer application form Status: Available

Needs: PDF file at first, later to be interactive and/or delivered via email. Will need software and/or

programming to create interactive or email-back forms.

Dept. staff to provide electronic version of form; Web staff to convert to PDF, post and

Project Museum collections available online Status: Proposed

Needs: Set up search access to collections database. Target markets are general public, teachers,

students, researchers, visitors

Project "Placer" newsletter online Status: Available

Needs: Create link on Museums home page, standard table of contents form w/links to newsletter on

1 long page. Include pictures as appropriate, considering download time.

Dept. staff to provide electronic version of publication. Web staff to convert to PDF and

and/or HTML and post.

Project Tours request form Status: Proposed

Needs: PDF file at first, later to be interactive and/or delivered via email. Will need software and/or

programming to create interactive or email-back forms.

Project Create Historical Organizations Committee page Status: Proposed

Needs:

Project Redesign dept. Web page Status: Available

Needs: Add links to pages for news releases, tours, Historical Advisory Board, Historical

Organizations Committee, Exhibits, Events, Tours, Volunteers, Educational Opportunities, Artifact Donation, Mission & Vision statements, Photos, Design page to enable easy addition

of links to other dept. pages, as online info. and services grow.

Dept. staff to provide information; Web staff to create and possibly maintain pages.

Project Do temporary or permanent museum exhibits page Status: Proposed

Needs: General public, teachers, visitors, researchers, students, potential volunteers.

Project Set up maps for each county museum Status: In Development

Needs:

Project Do communication exhibit page Status: Proposed

Needs: General public, teachers, visitors, researchers, students, potential volunteers.

Project Add links page to dept. pages Status: In Development

6

Needs: no special needs

Personnel

Project Job application form Status: Available

Needs: Provide PDF version of job application form at first, then provide interactive form where

data eventually dumps into existing dept. Sigma database.

Project Redesign dept. home page Status: Available

Needs: Provide general dept. info., with links to other pages with more detailed job-related and other

info. Phased - add links as new pages become available.

Project County jobs available Status: Available

Needs: 1 summary Web page listing open positions, with individual Web pages with detailed info.

identical to that printed currently on blue job description forms.

Project County site links to Personnel info. Status: Available

Needs: Nancy Nittler to discuss adding links to Personnel Web pages with other dept. heads whose

Web pages have jobs-related info. (e.g. IT)

Project Maps to job interview & testing sites Status: Proposed

Needs: Use existing maps, whenever possible. Create new maps, as needed. Add links to job

descriptions page. Be sure map pages also have text directions, for the blind.

Project Dept. Web pages Status: In Development

Needs: Add pages for job classifications, Personnel FAQ, salary schedule, general benefits package,

dept. staff allocations, links to CALPers & health providers' sites

Planning

Project Create Web pages linking to online EIRs Status: Available

Needs: Introductory Web pages for each environmental document posted online; set up simple URL

for information; do links, update other Planning pages

Project Create Web page fact sheets on proposed projects Status: Available

Needs: Static Web pages

Project Web page(s) outlining land use planning process Status: In Development

Needs: Create static Web page or pages, link to online planning docs

Project More community plans online Status: In Development

Needs: Static Web pages & PDF documents of community plans. Dept. staff to provide electronic

versions of community plans; Web staff to convert to PDF and perhaps to HTML.

Project Set up Placer Legacy Web pages Status: Available

Needs: prepare static Web pages, convert documents to PDF, set up table of contents page for

maps, set up links; investigate possibility of setting up FTP site for large metadata files.

Project Create Web pages for Planning Commission agendas Status: Available

and summary actions

Needs: prepare static Web pages for each agenda and summary action; update main Planning page

with new links.

Project Put monthly "Current Projects" online Status: Available

Needs: Create static Web page of list; convert Word doc to PDF version of list

Probation

Project Review dept. Web pages Status: Available

Needs:

Procurement

Project Online vendor application form Status: Available

Needs: Keep 1-page design, for simplicity.

1-A - Move general information to top of page, add additional information as introduction. April will send Ralph additional information.

1-B - Reformat the vendor application form to shorten it, as much as possible. (Ralph & April)

1-C - Use frames in the vendor application form to provide a right-hand frame listing the commodities by number, as a reference, rather than incorporating them as part of the form. (Ralph & April)

Dept. staff to make changes; Web staff to check and assist, as needed.

Project Bid solicitations index page, bid solicitation template Status: Proposed

Needs: Set up bid solicitations index page, and

department-specific Web template page for bid solicitations. Estimated number of active bid solicitations per week between 10 and 15. Explore option to have vendor to print out bid and bid submission form from Web pages, to submit by mail. (Ralph & April; procurement staff to maintain pages.)

Redevelopment

Project Design Web pages, maps, internal & external links Status: Available

Needs: RDA pages - home page, RDA FAQ, RDA project descriptions, project maps, "related links"

page; maps page requires work from Planning staff, to be arranged through F. Yeager.

Sheriff

Project Arrange move of SO Web pages to county site Status: Available

Needs: provide county policies & practices and style guide info., review site design, page content,

set up SO directory, test directory for functionality

Treasurer/Tax Collector

Project Online access to searchable database for assessment Status: ProposedNeeds: Write script to provide online on-the-fly customizable reports from dept. assessment

database; design system with security measures to protect data

Project Tax-related forms online Status: Proposed

Needs: Create PDF files from existing forms; interactive forms available when possible, using cgi or

other script

Project Info. online re. delinquent tax land sale, perhaps Status: Proposed

eventually conduct part of auction online

Needs: Create additional Web pages with more detail on available properties; create script(s) needed

to conduct online auction

Project Dept. email addresses on Web page(s) Status: Proposed

Needs: Request Treasurer/Tax Collector mailbox be created in GroupWise; add email link to T/TC

pages. Set up system within dept. for staff to check email, forward inside dept. as needed.

Placer County Web Policies and Practices

The goal for the Placer County Web site is to provide Placer County residents, vendors and customers with information which is easy to find; and services which make it easier for them to do business with the county.

The site was designed and created by Dr. Ralph Wilson, under contract, with this goal in mind – to make it easy for users to find the information they need and navigate easily through the site's large volume of information. This includes using pages which download quickly, with careful use of graphics.

The county Web site is a partnership. Partners include the Board, the CEO, County Counsel, and all other county departments. Other aspects of the partnership are IT's support and assistance, and the technical support of the county's Web contractor. The Board has supported and funded a single county Web site, where users may find information about Placer County and its operations. This design – a single Web address with separate sections for departments allows each department to meet their customers' needs – makes it convenient for users to find Placer County's site **and** detailed information.

County staff who have completed Web training and have received passwords to the Web site use these policies as they maintain their department Web pages. It's important we continue to work together using these policies and practices to manage that site.

General Web Site Policies and Practices

- ♦ Placer County has a single Web site which includes sections for all county departments. Each page on the site is clearly identified as belonging to the county Web site, and all pages but the home page should use the standard county template. The page header, footer and the left side bar on each page are integral parts of the Web site, designed to make site use and navigation easy. They should not be changed.
- A department may add new pages to its section at any time, using the standard county template. Staff should update or maintain the information on existing pages as often as needed, continuing to use the county template.
- Information added to the site must meet the Web site's goal, stated above.
- ♦ Departments are responsible for seeing their Web page information is up-to-date and accurate. If they have no staff trained to maintain their Web page(s), they will work with the PIO's office to see their page information is accurate.
- Department heads are responsible for the accuracy and appropriateness of the content of their department Web pages. Upon completing county Web training, their staff member will be given a password for their Web area, to maintain or create new pages.

- ◆ Department heads are responsible for seeing that the information on their Web pages text and graphics –are easily accessible to most users, using common browsers (Netscape 3.x and 4.x; and Microsoft Internet Explorer 3.x, 4.x and 5.x).
- ♦ Department staff should assure that they have copyright clearance for all content and graphics on their pages. Obtain a signed photo release form, if necessary (copies available from Susan Prince).
- ♦ Be sure all graphics on department pages are essential, so pages download quickly. (Slow page downloading because of graphics over-use is one of Web users' pet peeves.)

Web Links Policy

A Web link is an electronic pathway from the county's Web site to another Web site over which the county has no control. Visitors to the county's Web site may not know they are leaving the county site and may judge the county's site by what they find at the other site. For that reason:

- ♦ Links need to be well-marked to indicate the visitor is leaving the county Web site, saying something like "This link (these links) is (are) to non-county Web sites."
- ♦ Links need to be made only to outside agencies which support county business or which support the goals of the county Web site, and should reflect positively on the county.
- ♦ Links need to be apolitical and legal. Think carefully before adding links to associations or organizations which take advocacy positions. (An option could be to provide a Web address without making it a hot link, requiring the user to take specific action to visit the site.)
- ♦ Links to private business and commercial sites should be avoided. They could be interpreted by visitors as the county's endorsement of that business.

For Further Information

For other policy or practices matters not mentioned above, call Anita Yoder, 530-889-4012. For Web site technical questions and Web software help, call Susan Prince, 530-889-4080. For IT or network-related questions, call Ray Green, at 530-889-4211.

Placer County Web Style Guide

THE COUNTY WEB SITE

Placer County's Web site exists to provide Placer County residents, vendors and customers with information and services to make it easier to do business with the county. The county must make its information and services as easy to use and as accessible as possible. The site will be visually attractive and needs to be consistent in its use of navigation. Because we can't control what kind of computer equipment a visitor may be using, we need to keep the page design and layout simple, and use of Web technologies to a minimum.

Visitors to our site will be impressed by its clean, attractive, coherent look, the value of its content and by site reliability (i.e. links that work, information that is accurate and current). As of April, 2000, about 22% of the visitors to the county site were using older browsers, not the most recent versions of Netscape or Internet Explorer. For further information on research supporting why the county uses this approach to the Web, see <u>5-2-00 Hitbox research memo.doc</u> (in T:\Netserve\Pc-users\Web\).

Follow the style guidelines below so visitors to the county site find what they want quickly, and leave knowing that Placer County plans its Web site to meet their needs.

This style guide has four sections:

THE WEB PAGE TEMPLATE – The county template and how to use it

WEB TECHNOLOGY – What is recommended, what isn't, and why

PAGE LAYOUT – Page content layout within the county template

WEB WRITING STYLE – Writing for the Web

THE COUNTY WEB PAGE TEMPLATE

USE THE COUNTY TEMPLATE – To maintain a consistent and attractive look, the site is designed to use two Web tools, cascading style sheets (CSS) and the server side includes (SSIs). These two tools are incorporated in the Web template page. The template – with the SSIs and CSS – has important information for each Web page, including the page header showing your page is part of the county Web site, and navigation elements to make it easy for visitors to move around the site. Place your content in the page as described below, otherwise your page will not display properly (and may not display at all).

The county template is available at **T:\Netserve\Pc_users\Web\co-tmplt.htm.** There's a PowerPoint presentation called <u>county template info.ppt</u> in the same directory which shows how to install the template as the default "new page" for HoTMetaL Pro 4.0 on your PC. Call Susan at X4080 for help.

The template is designed to be easy to use. Open a new page. Add your page title in both places where you see **Page Title**. The top **Page Title** will display as the document or page title on a user's browser (e.g. at the top of the Netscape browser window). See below for tips on choosing page titles. The lower **Page Title** will appear on the page itself, at the top of your page content. Then insert your page content between the **Text below this line** and **Text above this link** comments.



WEB TECHNOLOGY BASICS

Your first goal in Web page design is to make your department's important information load quickly! That's why a visitor comes to your page. Unlike those of us using the county's T1 line, many – perhaps most – county residents connect to the Internet and the Web with a regular dial-up modem. That's often a 28.8 baud modem. Slooooow! While that will change in the future, that's how it is now. Web usability studies show visitors get impatient if they have to wait more than **10 seconds** for a Web page to load. If they can, visitors will leave the "slow" site and go elsewhere.

Unlike most commercial Web sites, the county site doesn't have direct competition. When people use the county Web site, it's likely they need information or a service that isn't available elsewhere. Because of our responsibility to serve our "captive audience," we must create pages which load quickly, without hitches. The best approach is to focus on content and keep it simple.

◆ USE IMAGES SPARINGLY — Keep the size of your page, including all images, as low as you can — under 40 KB, if possible. Determine the total size of your Web page by adding the size of your finished Web (HTML) file to the size of any images you've added to the page. (Don't add in the images in the template. After those download once, they will be cached — saved — on the visitor's computer. So they don't really count in your page size calculation.) Call Susan at X4080 if you have questions. We want the county site to be attractive, yet visitors come to the county site for information or services, usually not for the images (maps aside).

If a image will improve understanding of your page content, like a map with an office location, or a picture or chart to illustrate a concept or a project, that's helpful. Focus on what makes the image essential, then crop and resize the image to the smallest effective size. If an image is essential and large, put it on a separate Web page and indicate next to the link that the page may load slowly. Visit this page — http://www.placer.ca.gov/maps/maps.htm — as an example.

Finally, when you add an image, always add its dimensions to the Web page with width and height attributes (e.g. HTML code –). That allows a visitor's browser to save room for the image while loading the rest of the page more quickly. HoTMetaL Pro does this automatically when you use the "Insert/image" feature, but not when you simply type in the HTML code to add an image.

- ♦ SIZE IMAGES USING A GRAPHICS PROGRAM, NOT BY SIZING BY USING HTML CODE Set the size of your images with a graphics program like Paint Shop Pro or PhotoShop before adding the image to your Web page. If you adjust the size of the image using HTML code, although the image will display on the Web page at the size you've indicated, the visitor's browser must first download the full-size image before adjusting it to match the HTML code in your page. That slows page download time. If you don't have access to a graphics program, with a little advance warning, PIO staff can help resize your image. Call Susan at X4080.
- ♦ USE SPECIAL WEB TECHNOLOGIES ONLY IF NECESSARY Use JavaScript, Java or other Web technologies requiring plug-ins or special downloads only when absolutely necessary. Always check first with the Web coordinator or the Public Information Officer and the Web consultant. There may be a way to accomplish your goal for the Web page without using those technologies.

Why avoid them? If a visitor needs the information on your page but either can't or won't use the technology required, the visitor may not be able to get the necessary information or service. That reduces the value of the county's Web site (and will likely annoy the visitor).

- ◆ NO FRAMES There are several reasons why we very rarely use frames on the county site.
 - Older browsers often can't handle Web pages with frames well.
 - Many Web users don't like frames because they often make it difficult to print
 information, to navigate back through already-visited pages, or even to move to another
 page.

• Frames are almost impossible to navigate for blind visitors using text-based screen reading software.

Before using frames in your page, check with Susan, X4080, and the Web consultant. There may be a way to accomplish your goal for the Web page without using frames. For example, tables can be used effectively to format and present information (though they also pose difficulties for those using screen reading software).

If you absolutely must use frames, work with the Web consultant to be sure they work as well as possible with the county's site design.

• **DON'T CHANGE A FILE NAME** — One of the most irritating (and most common) problems on the Web is broken links. That often happens by mistake when an HTML file name (e.g. **planning.htm** or **news.htm**) is changed, "breaking" all links to that page. If you change a file name, of course you are able to change the links you create ... but how about those links someone outside the county or another county employee has created to your page? You won't even know you've "broken" their link, unless they contact you to complain. Pick your page name carefully when you create it, and then live with it. See below for tips on choosing page names.

PAGE BASICS & LAYOUT

◆ TITLES - Your page title is very important. That's the title you enter at the very top of your Web page (<TITLE>Document title: Page Title -- Placer County, Calif.</TITLE>). It is displayed in the colored bar at the top of the Web browser when someone visits the page. Even more important, when a Web user searches for information with a search engine like Yahoo or the county's internal search engine, the page title is what shows up in the search results. A carefully-chosen descriptive title will enable the visitor to find the correct information more quickly.

When you choose a title for your document, think of it as a "headline" for your page. Be brief and highly descriptive, use only four to six words to give a user a good idea of the page content. Do a couple of general searches to see examples of page titles that work, and those that don't. (Remember, the template already includes "Placer County, Calif." in each page title.) Some examples:

Page about upcoming Placer Legacy meetings:

- Upcoming Meetings (ambiguous)
- Upcoming Placer Legacy Meetings (specific)

Page with Board of Supervisors' meeting agenda:

- Board Agenda (ambiguous)
- Board Agenda, February 22, 2000 (specific)

Also, give each of your pages a different title. If someone wants to bookmark more than one page in your area, it can be very frustrating if several pages have the same title. (Remember,

- this is the page title which displays at the top of a browser window, **not** the title for your HTML file, since you can't have duplicate file names in your Web directory.)
- ♦ FONTS For the sake of readability, use just a few fonts in your pages, a primary font for the content and a different font for titles and subtitles. The county Web site cascading style sheet includes some font specifics. For example, each page title (showing at the top of the page content area) is set for subtitle H2, in Arial or another sans serif font, at 16 points. The H3 subtitle font is also Arial or another sans serif font, at 14 points. The page content default font is the font selected by the user. Let the style sheet work for you. Rather than use special fonts for your titles, use the H3 tag for subtitles. See the example.
- ♦ *UNDERLINING* Because links are underlined, don't use underlining to highlight your text. It can confuse the visitor. Use **bold** or *italics* or a different color (but not a link or visited-link color) for the font, or BLOCKQUOTE (an indentation) or white space in your formatting to emphasize your important content.
- ◆ USING TABLES Use tables to format complex data, or to shorten long lists of items, for convenient reading. Using color in a table can improve its readability and make the page more attractive. See the example.
- ◆ CENTERING AND JUSTIFYING TEXT Give careful thought to centering page content, don't do it as a matter of course. In our culture, the reader's eye naturally moves to the left edge of the page to look for the next line of text. For that reason, also, it's easier to read left-justified text, rather than full-justified (which causes uneven spacing between words). That's what users expect, which means that's what they prefer. Use left justifying for your page text.
- ♦ USING COLORS Use only light colors for background on your page or in tables, and dark colors for text. Strong colors with dark text, or dark colors with light text may be readable on your screen. However, different browsers display colors slightly differently, which may make your background/text combination hard to read on the user's screen. Users with vision problems like colorblindness, or those using black and white monitors may be unable to read the text at all. Low-contrast color text and background combinations can also be impossible to read when printed. Use the colors already used on the site, or similar colors, to give the site a sense of consistency and unity. If you want more information on using colors on your pages, call Susan at X4080.
- ◆ LINKS Use text describing the destination page content as your link, as shown in the examples, rather than "click here." "Click here" doesn't provide any information on your destination page for, say, a blind person using screen-reading software. While image maps and images are cool to use as links, they may be hard to use for a visitor with vision problems. Small images used as links are also hard to use for some users with mobility impairments. In addition, inexperienced Web users may not recognize them as links. (Though the Web template uses images for navigation in the page header [the tabs], there are duplicate text links in the template footer.) See the examples.
- ♦ **DEPARTMENT WEB PAGES** If your department has several Web pages on various topics, use a table on your department pages with a left side bar to include a list of links to your other

pages, as shown in the example. This is a Web navigation standard and will be familiar to site visitors. See the example. If you need help with a table, call Susan at X4080.

If your department has just two or three additional pages, it may be more convenient to use a small navigation table at the top of each page. See the example.

- ◆ LABEL ALL IMAGES Include a brief description for each of your images, using the ALT tag, to make your page information accessible to sight-impaired visitors. For example, will display "Placer County" when a visitor's mouse passes over it. Without the alt language, the image description will not display. Keep your ALT descriptions short, less than 5 words. Browsers sometimes have difficulty displaying long ALT text
- ♦ *USING WHITE SPACE* Careful use of white space can make your page more readable. However, don't use unnecessary line breaks and paragraph-spacers to separate sections of your page. Keep the need to scroll down your page to a minimum Web users don't like scrolling, and often leave the page rather than scroll down for further information.
- ♦ USE BOOKMARKS ON LONG PAGES, AND WITH INTERNAL SITE LINKS If there are subtitles on your page, consider adding a table of contents with bookmarks to make it more convenient for visitors to locate and reach the information they're seeking quickly. Susan can provide help with this, at X4080. See the example.

WEB WRITING STYLE

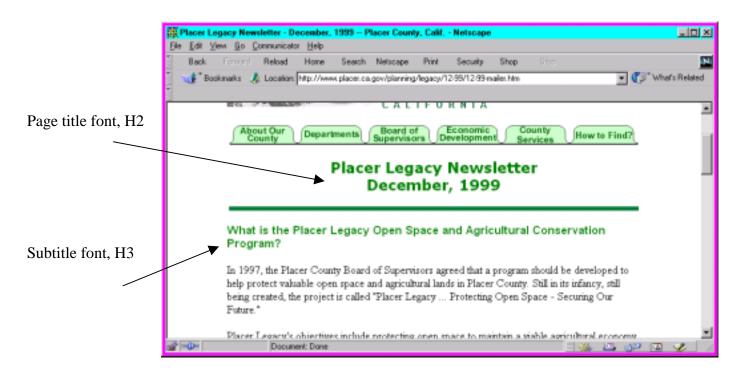
- ♦ INFORMATION "CHUNKS" Web usability tests show that visitors don't read material on the Web the same way they read material in print. When reading on the Web, visitors scan pages looking for the relevant information. Put your most important material at the top of your page. If it's possible, break the material into "chunks" or bullet points, with appropriate subtitles. See the example. And keep it brief Web usability expert Jakob Nielsen recommends editing print documents by as much as 50% when they're posted on the Web.
- ♠ RE-WRITE FOR THE WEB You may have to put documents on the Web which must be identical to the way they appear in print, like meeting agendas or committee or commission reports. However, the accepted writing style on the Web tends to be less formal and friendlier than the style used for most printed government documents. Visitors come to the site to improve their understanding or knowledge about county information and services. And Web users scan page content, looking for the information they want.
 Write or re-write material as if you were writing about the topic to your smart grammar school friend Morgan, who knows nothing about the subject you're describing but learns quickly. Avoid bureaucratic language or jargon whenever possible. Though you may not be able to do this on every page, whenever possible provide page content in bullet points. See the example.

If you must use jargon or special terms, provide a brief glossary of terms either at the bottom of the page, with bookmark links, or on a separate Web page, with links. See example. With some advance notice, PIO staff can help you re-write your content for the Web.

- ◆ SPELLING, GRAMMAR AND CAPITALIZATION Your page may be the first experience a visitor has with Placer County, and first impressions are important. Check your page carefully for spelling and grammar errors. Always run a spell checker, in addition to proofing the content carefully. Inappropriate word capitalization is a common problem and slows the natural course of reading. Consult a writing guide if you have questions about grammar or capitalization. There are many style guides available on the Web, including the one used by UC, Davis (http://www-styleguide.ucdavis.edu/intro.html) and the Colorado University at Boulder style guide (http://www.colorado.edu/Publications/styleguide/capitalization.html). There's a dictionary online, at http://www.m-w.com/. One of the best ways to avoid spelling and grammar errors is to have someone else proof your page before you post it.
- ♦ FURTHER WEB WRITING STYLE AND PAGE LAYOUT TIPS Here are some articles by Jakob Nielsen on writing well for the Web. His Web site is www.alertbox.com
 - Differences Between Print Design and Web Design
 - How Users Read on the Web
 - Be Succinct! (Writing for the Web)
 - Microcontent: How to Write Headlines, Page Titles, and Subject Lines

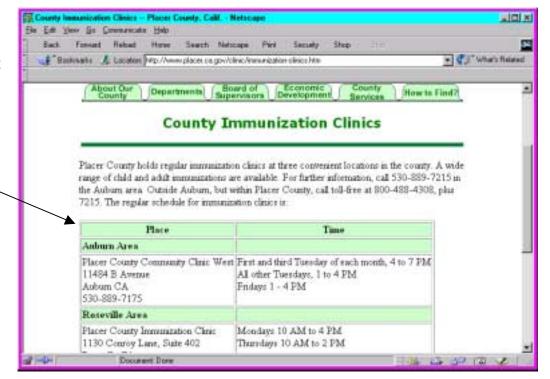
EXAMPLES

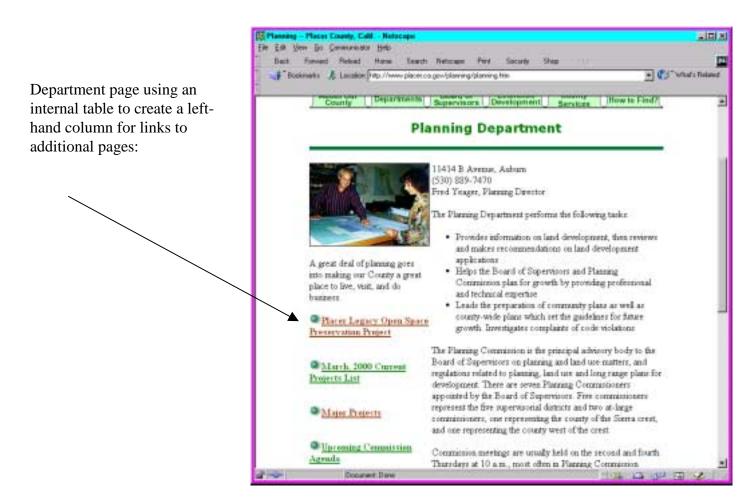
FONTS:



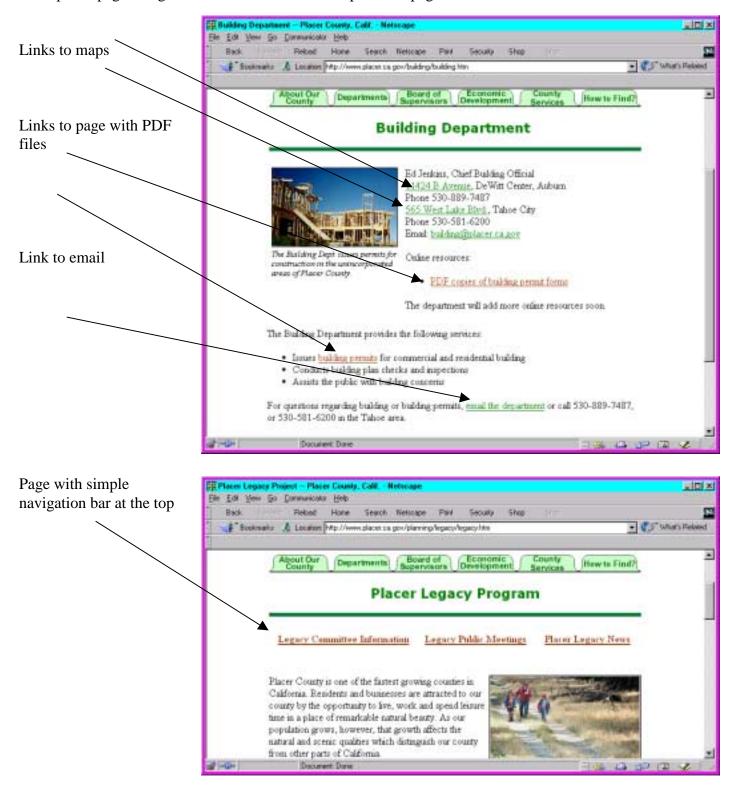
USING TABLES:

Here's an example using tables to organize data and using color background to highlight areas within the table.

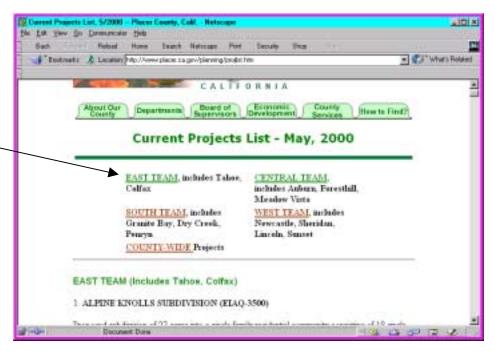


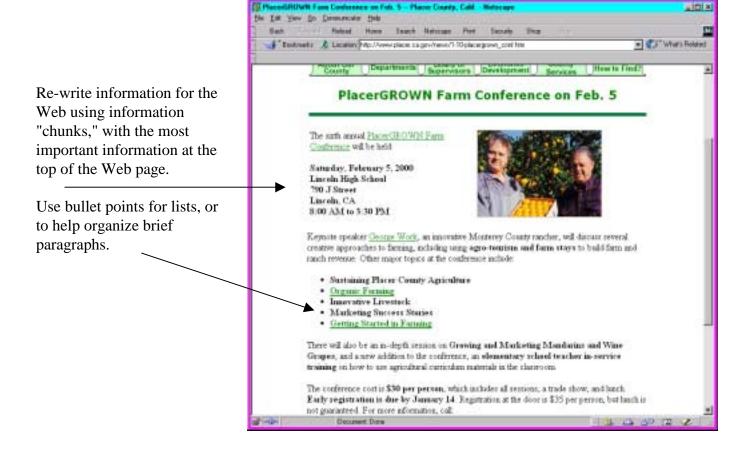


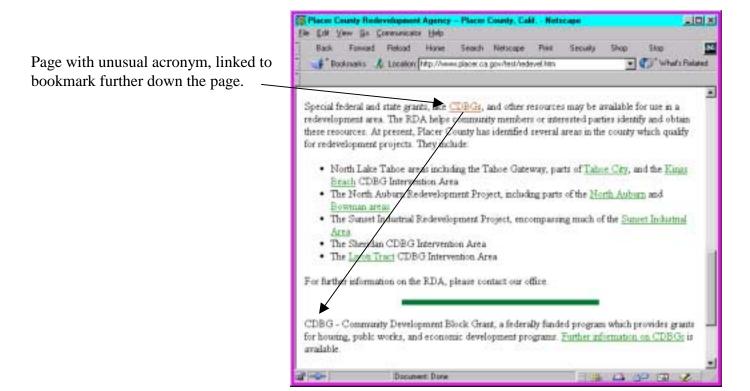
Example of page using text as links to additional department pages:



Page with table of links at top to bookmarks further down the page







ⁱ The Need for Speed, Jakob Nielsen, http://www.useit.com/alertbox/9703a.html

Placer County Intranet Goals and Assumptions

As the Intranet Team plans the county's intranet, we approach it with the following goals, in priority order, using the assumptions listed below. We also identified those goals and assumptions with policy implications.

Intranet Goals:

- 1. The intranet is intended to enable county employees to provide better customer service, with more accurate, timely and accessible information.
- 2. The intranet is intended to be easy for employees to use.
 - a. Designed using "best practices" information
 - b. Uniform page design and layout to emphasize organization and navigation
 - c. Design features to make page and layout maintenance easy
 - d. Intranet style guide for maintaining and adding content
- 3. Whenever possible and appropriate, the intranet and the county Web site will be designed to share content, to minimize content creation and maintenance.
- 4. The intranet will be designed to meet department employee needs.
- 5. The intranet will help the county retain important information over time, despite employee turnover.
- 6. The intranet will be a valuable business tool.
- 7. The intranet is intended to be accessible to all county employees at their offices or at a location convenient to their regular workplaces. (P)
- 8. The intranet will be accessible 24/7. (P)
- 9. The intranet will be designed to meet county data security needs, and will be included as part of the BCP. (P)
- 10. The intranet will be designed to meet county needs and standards at the lowest reasonable cost.

Intranet Assumptions:

- ➤ The CEO will provide policies and practices for accessing and contributing to the intranet. (P)
- The intranet is expected to reduce the cost and speed up communication with and among employees.
- ➤ The intranet is expected to improve the amount and accuracy of county information available to all employees.
- Like the county Web site, the intranet will use design and style standards and page templates to maximize "look and feel" and navigation consistency, for more convenient use.
- ➤ County departments will direct and maintain their intranet content, possibly with technical or other assistance in execution.
- The intranet can be implemented in phases.
- The intranet will be maintained technically using the same standards as the county network. (e.g. routine data backup, off-site data storage, regular maintenance, etc.)
- > The intranet hardware and software will be consistent with county standards.

PLACER COUNTY

ENTER DEPARTMENT NAME HERE



Enter Project Title Here

Feasibility Study Report

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Section I Administrative Information

SECTION I ADMINISTRATIVE INFORMATION

A. PROJECT TITLE

B. REQUESTING DEPARTMENTS

Identify lead department if more than one department is involved in request

C. DEPARTMENTAL SPONSORS/CONTACTS

I inserted an excel spreadsheet here

D. PROJECT STAFF ASSIGNED

E. ADDITIONAL KEY CONTACTS

(Do not duplicate if included in Departmental Sponsors/Contacts...include phone numbers)

- ♦ County Executive Office –
- ♦ Telecommunications Services –
- ♦ Facilities -
- ♦ Information Technology –
- ♦ Outside Agencies
- ♦ Vendors
- ◆ Procurement/Risk Management/County Counsel
- ♦ Others

F. BUDGET

Preliminary cost estimates.

One-Time

On-Going Annually

Does this project have and existing budget?

□ Yes Budgeted amount_____

□ No

G. ANTICIPATED FUNDING SOURCES

- ♦ On-going –vs- one-time sources
 - ♦ General fund
 - ♦ Non-general fund sources
 - ♦ State
 - ♦ Federal
 - ♦ Other

H. ASSUMPTIONS

Define any assumptions which may affect the planning or management of the project.

Assumption related issues could include:

- Multi vs. single year planned implementation
- Network vs. non-network based solution
- State/federal grant requirements or restrictions on funding
- State mandated and developed system implementation
- Scope of system access LAN/WAN/INTERNET
- E-Government/public access approach
- Identification of other Departments and outside agencies who would use the system
- Required security environment and/or restrictions
- Disaster Recovery Planning considerations (i.e., is this a critical business process requiring a back-up approach)

Section II Requirements

SECTION II REQUIREMENTS

A. DEPARTMENTAL BACKGROUND

Provide an overview of the Department/Division program, which relates to the project request. Discuss its mission, goals, organization, and physical location.

B. CURRENT AUTOMATION ENVIRONMENT

Describe and assess the current level of automated support existing in the agency database as it relates to the identified opportunity. Discuss current number of personal computers, terminals/workstations, operating environment/database, LAN/WAN/INTERNET configuration, power availability, highspeed network access, etc.

C. EXPLANATION OF NEED

Provide a general discussion of the opportunities, which are to be addressed by the study. Where possible, provide workload statistics or other quantifiable indicators to demonstrate the scope of the opportunity. Focus on Departmental-related productivity, efficiency, and economic related problems as well as public service improvements. Inefficiencies with the current automated approach should also be identified.

Sample questions:

- ➤ What are your goals?
- ➤ What data do you need to collect?
- ➤ Where will you get it?
- ➤ How will you get it?
- ➤ What will you do with it when you get it?
- ➤ Who will use this information?
- ➤ How can the collected data be used optimally throughout your organization for maximum cost savings?

D. PROJECT SCOPE/OBJECTIVES

Define the desired results in terms of customer service levels which will satisfy the Department's identified needs. This item should include major areas of functionality, desired system interfaces, number of system customers, communication requirements, public interface/E-Government approach, and project system growth requirements over a three year period.

E. FUNCTIONAL REQUIREMENTS

This section would provide a greater level of details as to what the system is actually to do. It should include:

- Specific Functional Requirements/System Capabilities
 - -- Estimated Data Volumes, Frequencies, Timing
 - -- Performance Requirements
 - -- Pre-Implementation
 - -- Post-Implementation
 - -- Reporting Requirements
 - -- Public Interface/E-Govt. (Scope of Access)
 - Recommended/Required System Interfaces
 - Projected Hardware/Communications/Network/Software/Database Requirements.
 - Security Requirements
 - Staffing/Technical Assistance Requirements (Before, during and after Implementation)
 - Departmental
 - Functional
 - M.I.S.
 - I.T.
 - Third Party

1. E-Government

- 1.1 While online access to the XXX system database may not be implemented in the first phase of system implementation, the system must be capable of providing online on-the-fly reports from user-selected criteria, using a RDBMS with access to all system data fields. For example, a Web site visitor could request:
 - 1.1.1 A report on the current status of a proposed planned unit development, including dates of any scheduled public hearings
 - 1.1.2 A report with all data, including historical (e.g. owners, permits issued), for a parcel of land, identified by APN
 - 1.1.3 A report listing fees paid and to be paid on a proposed land use project
 - 1.1.4 A report listing outstanding code violations for a county landowner
 - 1.1.5 Ability for the public to retrieve information by any identifier such as owner name, address, APN, Project # etc

- 1.1.6 Ability to provide public review of the current status of application including:
 - 1.1.6.1 Date received
 - 1.1.6.2 Date returned
 - 1.1.6.3 Date approved
 - 1.1.6.4 Hold status
- 1.2 Placer County will be able to provide XXX system online information and services using its standard Web template
 - 1.2.1 Have inter-active forms to issue routine research requests and other requests as necessary
- 1.3 Vendor will provide examples of how other jurisdictions are using their automated permits system to provide e-government information or services on their Web sites, or in another fashion (e.g. IVR system)
- 1.4 The system database design and function will conform to current industry standards for online use and presentation
- 1.5 Ability to collect fees via Internet

2. MIS Requirements

It is recommended that the system use a client/server architecture where the client and server conform to the following County Standards. (See Appendix E)

- 2.1 Printers
 - 2.1.1 The system must be able to print to a variety of printers and plotters.
- 2.2 Backup
 - 2.2.1 The system must be able to backup data to another media for off-site storage. This could be optical disk drives, removable disk drives, or cartridge tape. The backup media should be able to contain 5 years of data.
- 2.3 Relational Database Management System
 - 2.3.1 It is recommended that the system application use an industry standard relational database management system (RDBMS) that is compliant with the American National Standards Institute (ANSI). The County currently has a site license for Oracle; therefore this would be the preferred solution. There should be Open Database Connectivity (ODBC) drivers available so that other software applications may access the data.
- 2.4 Graphical User Interface (GUI)
 - 2.4.1 The system must use a graphical user interface (GUI) to provide a standard, user-friendly, look and feel. The system should make good use of GUI features including windows, menus, scroll bars, pop-up-windows (dialogs), buttons, and list boxes.
- 2.5 Integration with other Software the data must be accessible to other software including:
 - 2.5.1 E-Mail & GroupWare:
 - 2.5.1.1 Novell GroupWise
 - 2.5.2 Internet Browsers:
 - 2.5.2.1 Netscape Navigator
 - 2.5.2.2 Other HTML compliant browsers

- 2.5.3 Web Page Creation Tools:
 - 2.5.3.1 SoftQuad HotMetal Pro
- 2.5.4 Web Services:
 - 2.5.4.1 Provided via HTTPS, HTTP, XML, JAVA
 - 2.5.4.2 Must conform to County Portal Standards
 - 2.5.4.3 Ability to access system via Browser front end or Thin Client (i.e. Citrix Metaframe)
 - 2.5.4.4 RDBMS Applications used by the County:
- 2.5.5 Desktop Applications:
 - 2.5.5.1 Microsoft Office 97 / 2000: Access, Excel, Word, Powerpoint
- 2.5.6 Report Writers:
 - 2.5.6.1 Crystal Reports
 - 2.5.6.2 Seagate Crystal Info
- 2.6 Performance:
 - 2.6.1 System performance criteria example, (given 75 concurrent users and a project database of 30,000 records) must meet all specifications as defined in this FSR while running on a 100mb LAN connection:
 - 2.6.1.1 Screens
 - 2.6.1.1.1 Moving from screen to screen or field to field should not take more that 1 second.
 - 2.6.1.1.2 Moving from one record to another should not take more than 2 seconds.
 - 2.6.1.1.3 Lookup of a record with a specific keyed value should not take more than 5 seconds.
 - 2.6.2 Scalability
 - 2.6.2.1 The system must be scalable to accommodate twice the number of users and three times the database size for the lifecycle of the product. Users can replace or add on components to increase capacity or speed (e.g., add RAM, add disk space, increase network bandwidth, replace CPU).
 - 2.6.2.2 Data must be able to be moved to a separate historical database. The system should be able to hold at least 5 years of data depending on each department's needs.
 - 2.6.3 Screen Navigation
 - 2.6.3.1 The system must allow users to freely move from screen to screen without having to return to the main menu. When navigating from screen to screen, the system must have the ability to maintain the current information and carry the information to the next screen to eliminate the need to re-enter any information.
 - 2.6.4 Data Manipulation
 - 2.6.4.1 All validation must be done by user driven tables.
 - 2.6.4.2 Must be able to accomplish all data manipulations while still maintaining system response times.
 - 2.6.4.3 Data should have default values where applicable.

- 2.6.4.4 The system must allow the user to add, update, delete, store, or display information in any module without exiting the system. The system must allow users to search, query, and summarize 2.6.4.5 the data. 2.6.4.6 Reports should be able to show graphs, charts, or other
- graphical representations of data.
- 2.6.4.7 The ability to add new, custom fields of information to the database.
- Multi-user 2.6.5
 - 2.6.5.1 The system must be available in a multi-user environment and provide data locking or buffering routines to prevent loss of information by simultaneous updates.
- 2.6.6 Multitasking
 - 2.6.6.1 The system must allow users to access multiple applications on the client at the same time.
- 2.6.7 Security
 - 2.6.7.1 The system must have a Database Administration Module to allow a system administrator to manage local and remote user access.
 - 2.6.7.2 System and application level passwords:
 - Passwords must be encrypted during user authentication.
 - 2.6.7.2.2 Should be required to access the system and application modules. Users should be able to change their own passwords.
 - Utilities should be incorporated to enforce rules 2.6.7.2.3 for password construction. Rules should provide for minimum length passwords, allow for a combination of alpha, numeric, and special characters, provide for a mixture of upper and lower cases, and force password change on predetermined basis of time.
 - 2.6.7.2.4 Password module should have the ability to "lock-out" users after a selected number of failed attempts. The module must require administrator intervention to remove the lockout.
 - 2.6.7.3 Operating system and system utilities security
 - The vendor should be knowledgeable of all 2.6.7.3.1 known security vulnerabilities and resolutions for the operating system and system utilities proposed. The application and file structure should incorporate the recommended vulnerability resolution within its design whenever secure application/file structure design is the only known vulnerability resolution.

- 2.6.7.3.2 The vendor should actively monitor security bulletins made available for the operating system and system utilities implemented and provide integrated application and/or file structure "patches" when integrated application and/or files structure "patches" are the recommended resolution to newly discovered vulnerabilities. Patches for security related purposes should be applied immediately as they become available, with prior notification to the system administrator.
- 2.6.7.3.3 Should the vendor also be responsible for the maintenance of the operating system and system utilities provided, the vendor should provide security "patches" for the operating systems and system utilities. Patches for security related purposes should be applied immediately as they become available, with prior notification to the system administrator.
- 2.6.7.3.4 The operating system and system utilities should have regularly scheduled updates applied at least twice a year.
- 2.6.7.3.5 Vendor must identify estimated availability of the system.
- 2.6.7.3.6 Vendor must identify disk sizing for this application.
- 2.6.7.4 Data Delivery:
 - 2.6.7.4.1 Application must use TCP/IP tranport only.
 - 2.6.7.4.2 Application must not use any proprietary data frame types at any time.
- 2.6.7.5 User Levels:
 - 2.6.7.5.1 Multiple levels of user security that provide for read-only, read-write, and update access. Database administration functions should provide the ability to selectively "lock" certain database tables.
- 2.6.7.6 Screen Access:
 - 2.6.7.6.1 If a user doesn't have the authority to use a screen, function, or menu, then they should not be able to see or be aware of it.
- 2.6.8 Maintenance by County Staff
 - 2.6.8.1 User groups:
 - 2.6.8.1.1 The system Database Administration Module must allow the System Manager to create, store, and assign user groups having similar access capabilities. When a new user is assigned a user ID and password, the System Administrator must be able to simply select from a pre-established user

access group, or if needed customize user access for a group to create a new category.

- 2.6.8.2 Customizable:
 - 2.6.8.2.1 The system must allow for variable titled field names on screens. The user must be able to change these field names if necessary. The system must allow addition of a new table field at any time.
- 2.6.8.3 Backup:
 - 2.6.8.3.1 The procedure should be automated where possible and easy to use.
- 2.6.8.4 Data Archiving:
 - 2.6.8.4.1 Data must be able to be moved to a separate historical database. The system should be able to hold at least 5 years of data, depending on each department's needs.
- 2.6.8.5 Warnings:
 - 2.6.8.5.1 If the system is nearing capacity of database or concurrent usage, then a warning mechanism should be in place to inform users.
- 2.6.8.6 Crash Recovery:
 - 2.6.8.6.1 In case of failure, there must be a means to restore lost data from backed up data that is easy to use, has been demonstrated, and documented by the vendor within a 4 hour timeframe.
- 2.6.9 Vendor Support:
 - 2.6.9.1 System should be totally supported by the selected Vendor including operating system, database, and application for the life of the contract.
 - 2.6.9.2 Vendor must identify County IT staffing needs, required skill set, and time commitments for product implementation.
 - 2.6.9.3 Vendor must identify County staffing needs by department, required skill set, and time commitments for product implementation.
 - 2.6.9.4 Vendor must identify County IT staffing needs, required skill set, and time commitments for on-going product support.
 - 2.6.9.5 Vendor must identify County staffing needs by department, required skill set, and time commitments for on-going product support.
 - 2.6.9.6 Updates, Upgrades, Annual Support:
 - 2.6.9.6.1 Need option to include updates to keep software able to meet new state and federal laws and mandates.
 - 2.6.9.7 Online Help:
 - 2.6.9.7.1 Online manuals in PDF format.
 - 2.6.9.7.2 The system must provide a context sensitive help selection that can be accessed from any screen, that displays help related to the screen in use.
 - 2.6.9.8 Training:

- 2.6.9.8.1 Local area training should be available. Preferably on-site.
- 2.6.9.8.2 Training requirements will be negotiable based upon level of support as agreed upon in contract.
- 2.6.9.9 Warranty:
 - 2.6.9.9.1 A minimum of 90 days of software support for major releases and updates. Ongoing software support for subsequent years or releases must also be available through a software maintenance agreement available on a set fee basis.
- 2.6.9.10 Ouestions:
 - 2.6.9.10.1 Toll free help number should be available during PST business hours.
- 2.6.9.11 System Documentation:
 - 2.6.9.11.1 The software must include a comprehensive user's manual documenting all operations of the software. Manuals must include sample reports, screen illustrations, and instructions, and provide step-by-step training to teach non-technical operations and administrative personnel to operate the software.
- 2.6.9.12 User Group:
 - 2.6.9.12.1 It is strongly suggested that vendors have user group meeting in the northern California area for customers.

 These meeting should occur at least on an annual basis.

F. Staffing/Technical Assistance Requirements

- Departmental
 - ♦ Functional
 - ♦ M.I.S.
- **♦** I.T.
- ♦ Third Party

Section III Alternatives Analysis

SECTION III ALTERNATIVES ANALYSIS

A. Alternatives Considered

- Application Software
- Hardware/Communications/Network Approach
- Database/Operating System

Define each application software alternative considered (i.e., in-house development, selected public-private partnership, transfer of public domain software, commercially available packages or state mandated and developed system) and the associated hardware/communications and database/operating system approaches considered.

B. Detailed Analysis

Functional

The functional analysis should address strengths and weaknesses in each of the following areas:

- Functional Requirements/System Capabilities
- Performance Requirements
- System Interfacing
- Security Requirements
- Public Access/E-Government
- Installation Approach
- Conversion Approach
- Training Approach
 - -- For Implementation Team (Functional and Technical)
 - -- For End User in how to use system when implemented
- Adherence to County Network/Technology Standards
- Staffing Requirements (Before, during and after Implementation)
 - -- Departmental (functional/M.I.S.)
 - -- I.T.
 - -- Third Party Technical Support

C. Cost Summaries

The cost summaries should summarize the cost details from the following section.

- Cost
 - -- One-Time
 - -- On-Going

D. Cost Details

The cost analysis should be segregated between one-time and on-going as follows:

- One-Time Costs
 - -- Applications Software Purchase/License Fee

- -- Desired Software Modifications/Interfaces
- -- Installation
- -- Conversion
- -- Training (Functional and Technical)
 - -- for Implementation Team
 - -- for End User in how to use system when implemented
- -- Hardware, Database, Operating Software, Communications, Network-Related
- -- Facilities (Electrical, Environmental, Space)
- -- Decommissioning of the Old System
- -- Staffing (Departmental, I.T., Third Party Technical Support)

On-Going Costs

- -- Applications Software Maintenance/Upgrades/License Fees/Customized Enhancements
- -- Hardware, Operating Software and Communications/Network Related
- -- Software, PC and Hardware/Communications Related Upgrades
- -- Database and Other Technical Training
- -- Staffing (Departmental Functional and Technical, I.T., Third Party Support)
- -- Internal Service Level Agreements
- -- Disaster Recovery Planning/Back-Up

E. Advantages/Disadvantages

Advantages/Disadvantages

For each alternative identified as feasible, prepare a summary, which evaluates both its functional capabilities and cost.

Section IV Recommended Approach

SECTION IV RECOMMENDED APPROACH

1. Rationale for recommendation

Identify and justify the alternative which best satisfies the functional and technical requirements, as well as the budget associated with the project. This section should include a discussion of the following items:

- Describe Recommended Alternative
- Benefits

Define productivity, efficiency and economic related benefits available to the Departments and the public. Identify service improvements and cost reduction benefits. The Benefit Section should relate back to the issues identified in Section C, the Explanation of Need of the Requirements Definition. Define, as specifically as possible, the positive impacts on the County's functional, technical, and public service environments.

• One-Time Costs

- -- Applications Software Purchase/License Fee
- -- Desired Software Modifications/Interfaces
- -- Installation
- -- Conversion
- -- Training (Functional and Technical)
 - -- for Implementation Team
 - -- for End User in how to use system when implemented
- -- Hardware, Database, Operating Software, Communications, Network-Related
- -- Facilities (Electrical, Environmental, Space)
- -- Decommissioning of the Old System
- -- Staffing (Departmental, I.T., Third Party Technical Support)

On-Going Costs

- -- Applications Software Maintenance/Upgrades/License Fees/Customized Enhancements
- -- Hardware, Operating Software and Communications/Network Related
- -- Software, PC and Hardware/Communications Related Upgrades
- -- Database and Other Technical Training
- -- Staffing (Departmental Functional and Technical, I.T., Third Party Support)
- -- Internal Service Level Agreements
- -- Disaster Recovery Planning/Back-Up

Discuss the Following Issues:

- Potential Risks/Concerns Associated with the Recommended System and/or Implementation Approach
- Procurement Approach
 - Based on the FSR analysis, recommend either a competitive, sole source, or state mandated implementation approach.
- Sole Source
 - Show legal justification
 - Get County Counsel approval

2. Benefits

Describe the benefits that the county would gain from this system, such as:
Communication
Staff Effectiveness
Control and Reporting
Anything specific to this product

Section V Management Plan

SECTION V Management Plan

A. Project Responsibilities

Based on the recommended approach (i.e., sole source procurement, competitive bid, or state mandated installation) identify the major steps which need to be taken to purchase and/or implement the selected solution. Further, identify staff (from the Department, both functional and technical staff, I.T., third party technical support, Procurement, Telecommunications, Facilities, County Executive Office, etc.) whose support will be required. Develop a recommended Project Team for the system acquisition and implementation.

B. Proposed Schedule

Develop a proposed acquisition and implementation schedule which takes into consideration the Department's desired system implementation date, existing Departmental commitments, existing I.T. related commitments to other Departments, the completion of County internal work steps, a realistic procurement time-frame, and ongoing competing demands for both Departmental M.I.S. and I.T. technical and analytical staff resources.

C. System Management/Maintenance

Based on the proposed solution's configuration and complexity, provide a recommendation on the division of responsibilities including who decides and assigns point of contact responsibility relating to system administration and back-up between the Department, I.T., and third party technical support.

(Example)

IT Responsibilities

Project Management

Workstation configuration/Image/PC standards

Delivery of standard Network Services/Resources including:

- Network Security
- Network Data Backup (XXX System support would be limited to tape mounts for backup jobs only.)
- Network Application Support (Office, GroupWise, Netscape, etc.)
- Network Login/Accounts
- Network Printing Services
- Network File Storage

Novell Application Launcher (NAL)

- Review and approve any new NAL pushes to provide change management
- Work with Requesting Department staff to set up new release on ghost workstation
- Work with Requesting Department staff to test the push via NAL
- Change version number when ready to deploy the newly created NAL push

Provide physical access to the XXX System server as needed

Requesting Department Staff responsibilities (these tasks can be outsourced to the selected vendor or county approved contractor at the expense of the requesting department if desired)

Operating system administration (including but not limited to the following tasks)

- Maintain OS
- Maintain latest applicable upgrades/patches
- Backup OS, programs/files/databases
- Recover files/databases from backup
- Manage file system space
- Monitor system performance (disk, CPU, memory)
- Ensure access to users for desired hours of operation

Oracle database administration (including but not limited to the following tasks)

Enter Name of Feasibility Study Report Here

- Install Oracle upgrades
- Maintain latest applicable upgrades/patches
- Maintain Oracle accounts
- Maintain database file layout
- Monitor file sizes
- Maintain database backups/exports
- Monitor database performance for runaway processes
- Monitor database performance for hw/sw configuration
- Start/shut database in emergency situations
- Recover database from failure (archive log files, tape backups)
- Support users for desired hours of operation
- Manipulate data with SQL queries, as required by vendor XXX System technical administration (including but not limited to the following tasks)
- Local Application Support
- XXX System Support
- XXX System Account Administration
- XXX System Application Security
- Disaster Recovery for the XXX System in the event of data problems
- Training for any XXX systems related applications
- Troubleshooting and maintenance, including vendor coordination of XXX systems applications
- Software Maintenance for XXX System specific applications. XXX System functional administration
- Create, modify, and delete application user accounts. Novell Application Launcher (NAL)
- Gain IT approval for any new NAL push prior to implementation
- Work with IT to set up new release on ghost workstation
- Work with IT to test the push via NAL

Documentation of XXX System (including but not limited to the following tasks)

- Server installation
- Client installation

Provide advance notification to IT of any system/application changes (approval will be required prior to any changes)

The requesting departments will be responsible for the cost of system maintenance as per contract.

Staffing levels required during maintenance will be determined in the RFP process via recommendations by the participating vendors.

D. Critical Project Success Factors

Identify critical factors that relate to the success of the project and the unique challenges it may present to the Department and I.T.

(Examples)

Factors critical to the overall management of the project include the following:

- ➤ Board of Supervisor approval of system.
- Management commitment to the overall project and dedication of needed resources.
- ➤ Necessary funding and staff resources to implement and maintain the system on an on-going basis.
- ➤ It is highly recommended that staff from one department, to be determined at a later date, be the overall Placer County XXX System administrator. This staff member would work closely with the selected vendor to resolve any issues that arise. If it is determined that this staff would be from the IT department it will require additional IT staff as determined by the vendor response to the RFP and would be funded by this project.
- ➤ It is recommended that the staff that will be assigned as Placer County XXX system administrators also be directly involved in the implementation phase of the project.
- ➤ Complete Deliverables All deliverables should provide the level of detail necessary to effectively monitor and manage the project.
- > Staff with required skills Staff with the necessary functional (Customer Departments) and technical (IT Department) skills should be included on the project team. Management should also be included to ensure executive commitment.
- Monitor the project at an appropriate level- Monitor the project at a level appropriate to the size and complexity of the project (i.e., arrange to capture and report progress data on a monthly, weekly, or daily basis)
- ➤ Analyze progress based on projected outcome Manage the project on an estimated-to-complete basis to ensure that staff is continually looking ahead to correct situations before large problems develop.
- ➤ Produce formal written status reports Use status reports as a mechanism to fully assess project status on at least a monthly basis.
- ➤ Document and report any project scope changes ensure that change orders are documented and approved by the appropriate individuals before proceeding.
- Freeze completed work obtain a formal sign-off from users at critical junctures in the process. Freeze the work so that no further changes are made.
- ➤ Remember the criteria for a successful project Manage the project to stay on schedule and within budget, and to provide the quality product necessary to meet established standards and satisfy user needs.

E. Right to review

Due to the multiple department dynamics and the IT involvement in this project, all parties will have the right to review these terms and responsibilities on a yearly basis.

F. Management Sign-Off

I have reviewed this Feasibility Study Report and it includes all functional requirements needed by our department. I fully accept the recommendations as outlined in this report.

Name Department	Date	
Name Department	Date	

Appendix A - Placer County Standards

Standards Required for Access to the County Data Network

Purpose

To define standard equipment, software, operating systems and network operating systems authorized for use on the Placer County enterprise data network system.

Policy and Process

Unless specifically approved by the Information Systems Security Officer and M.I.S. Manager, the list below defines the only objects allowed on the County network. Exceptions will be considered only when the objects below cannot satisfy a requirement.

<u>System</u> <u>Identifier</u>
Desktop PC Dell Optiplex

Desktop Operating System MS Windows NT 4.0/ Windows 2000

Office Suite MS Office 97 / Office 2000

DBMS Oracle (Existing DBMS allowed until replaced)

Email GroupWise

Help Desk Software Heat for Windows (32bit)

Reporting Software Crystal Reports, Seagate Crystal Info Desktop Antivirus Network Associates VirusScan

Desktop/Workgroup PrinterHP DeskJet, LaserJetLaptop, NotebookDell LatitudeWorkstationDell Workstation

Network Interface Card (NIC)

3Com or HP

Network Server HP NetServer (Toptools compliant)

LxR series

Network Operating System IntranetWare 4.11, 5.X

MS Windows NT 4.0 / Windows 2000

Network Backup Suite Arcserve 6.x

Network Antivirus Network Associates Vshield

Network Media Ethernet 10baseT, 100baseTX, 100baseFX,

FOIRL

Network WAN Transport T1, 56K ADN, IDSN, ATM, DSL, or other newer

technology

Hub, Concentrator 3Com SuperStack (series)

Ethernet Switch 3Com (various)

Router 3Com NetBuilder, CoreBuilder (series)

CSU/DSU Digital Link (series)
Modem* Motorola 3500
US Robotics/3Com

Firewall Security CheckPoint Firewall 1

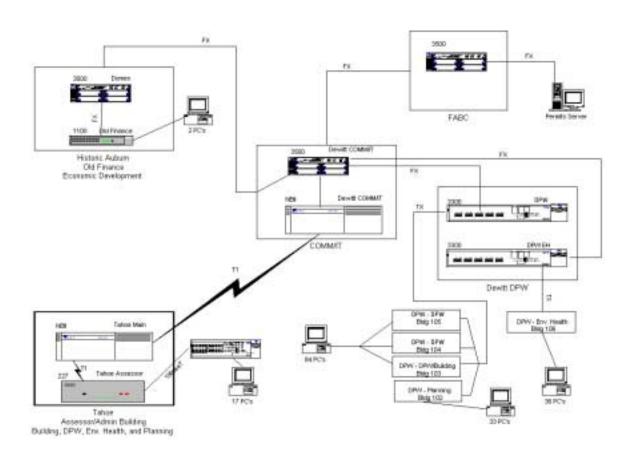
Remote Access Software Citrix Client
Remote Access Server Citrix Metaframe

Network Dialup Security SecurID

^{*} In accordance with the Placer County Information Systems Security Guide, Dial-up modems or devices are not to be connected to the network

Appendix B – Network Diagram

(Example)



Appendix C - Glossary

(Example)

AA Administrative Approval
ABS Additional Building Site
AGP Agricultural Preserve

ANSI American National Standards Institute

APN Assessor's Parcel Number
ARP Administrative Review Permit

Application Service Provider.(Placer County would basically rent the system from the vendor. All data, server, application would reside at the vendor's location and staff

ASP would access via an internet browser.)

CAD Computer Aided Drafting

CDF California Department of Forestry

CoC Certificate of Compliance
CUP Conditional Use Permit
DAG Development Agreement
DPW Department of Public Works

DSA Design/Site Review

EIAQ Enviornmental Impact Assessment Questionaire

EIR Environmental Impact Report

ESRI Environmental Systems Research Institute (Vendor for Placer County GIS System)

FAQ Frequently Asked Questions
FSR Feasibility Study Report
GIS Graphical Information System
GPA General Plan Amendment
GUI Graphical User Interface
IT Information Technology Division

IVR Integrated Voice Response System
LDD Land Development Department
MBLA Minor Boundary Line Adjustment

MIS Management Information Systems Division

MLD Minor Land DivisionMUP Minor Use Permit

NAL Novell Application Launcher
NOP Notice of Preparation
NR No Response from vendor
ODBC Open Database Connectivity

Performance Accounting Series (Oracle base accounting system used by Placer

PAS County)
POS Point of Sale

RDBMS Relational Database Management System

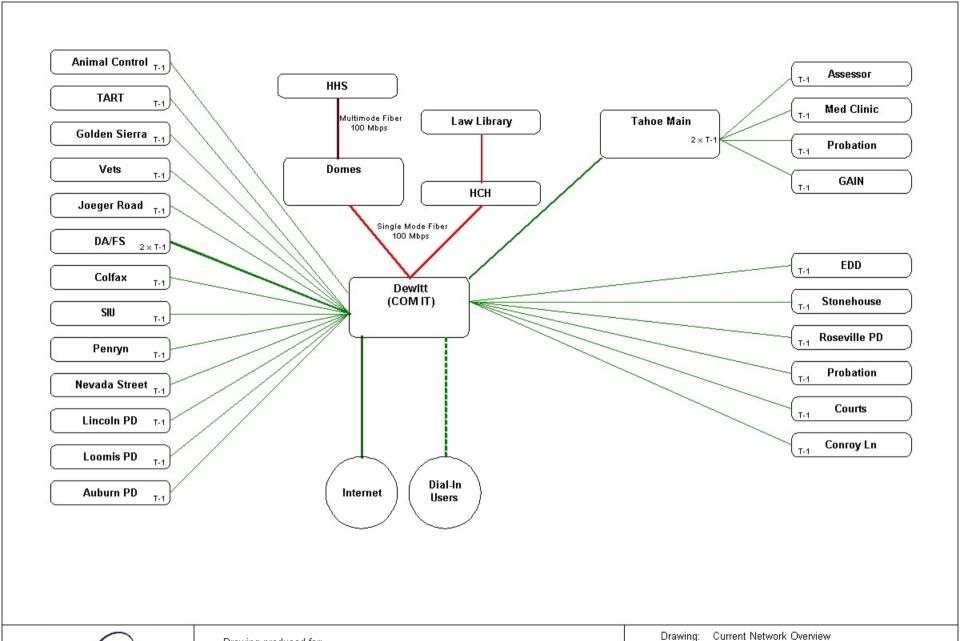
REA Rezoning

RFP Request for Proposal SUB Major Subdivision

VAA Varriance

ZTA Zoning Text Amendment

Document prepared by input from the following people:



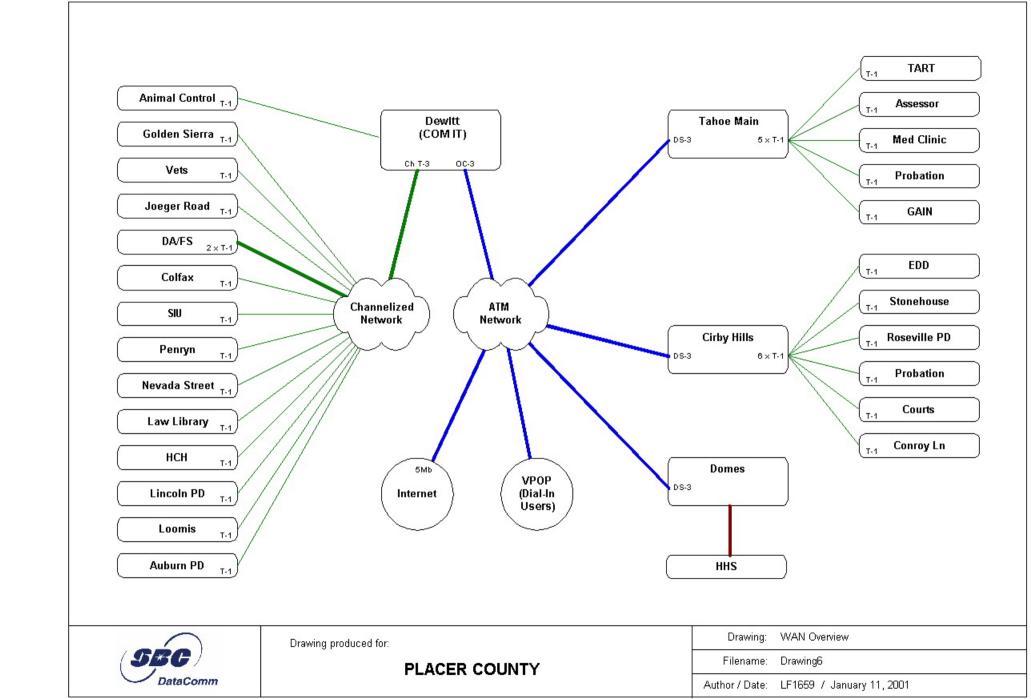


PLACER COUNTY

Drawing produced for:

Filename: Placer County Network v21.vsd

Author / Date: mp3157 / January 12, 2001



Standards Required for Access to the County Data Network

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As Of: September 2000

Purpose

To define standard equipment, software, operating systems and network operating systems authorized for use on the Placer County enterprise data network system.

Policy and Process

Unless specifically approved in writing by the Director of Administrative Services and the Deputy Director for Information Technology, there will be no exceptions to the policies and processes presented below. Exceptions will be considered only when the objects below cannot satisfy a requirement. Check with I.T. for current versions and models. All requests for network access should be made through the Network Customer Service Center (NCSC) x4357.

System Identifier Desktop Workstation/PC Dell Optiplex Desktop Operating System MS Windows NT 4.0 Office Suite MS Office 97 **DBMS** Oracle Email GroupWise

Help Desk Software HEAT for Windows (32bit)

Reporting Software Crystal Reports

Desktop Antivirus Network Associates VirusScan

Desktop/Workgroup Printer HP DeskJet, LaserJet

Laptop, Notebook Dell Latitude Network Interface Card (NIC) 3Com 3C905B-TX

Network Server HP9000; HP NetServer (Toptools compliant)

Lx, LP, LH, LC, E60 (or greater);

Dell PowerEdge Network Operating System IntranetWare 4.11, MS Windows NT 4.0

HPUX

Network Backup Suite Arcserve 5.x, 6.x

Network Antivirus Network Associates Vshield

Network Media Ethernet 10baseT, 100baseTX, 100baseFX, FOIRL

Network WAN Transport T1, 56K ADN, IDSN, DSL, ADSL Hub. Concentrator Cisco, 3Com SuperStack (series)

Ethernet Switch Cisco, 3Com (various)

Router Cisco

CSU/DSU Digital Link (series) Modem* 3Com w/dial-back US Robotics/3Com Firewall Security

CheckPoint Firewall 1

Remote Access Software Citrix Client Remote Access Server Citrix MetaFrame

Network Dialup Security SecurID Netscape Web Browser **Enterprise Management** Bindview

1 standards.doc November 17, 1998

^{*} In accordance with the Placer County Information Systems Security Guide, dial-up modems or devices are not to be connected to the network.

Security Standards for the County Data Network

As Of: September 2000

Purpose

To define standard security procedures and processes for computer system use on the Placer County enterprise data network.

Policy and Process

Unless otherwise approved in writing by the Director of Administrative Services and the Deputy Director for Information Technology, there will be no exceptions to the policies and processes presented below.

Authorization and Accountability

- Each individual must have a separate log-in account and password for network use.
- Only one logical connection to the network is allowed for each individual.
- Public and generic accounts must be restricted to specific workstation(s) and assigned to workgroups for select, specific business processes.
- Create passwords that have a minimum of 8 characters with a combination of alphabetic, numeric, and special characters.
- Change default passwords provided by the vendor for access to applications/systems on the network.
- Create different passwords for applications/systems on the network.
- Do not share passwords.
- Do not record or write down passwords and store in a manner that can be easily accessed by others.
- All passwords must be changed on a specified, periodic basis.
- All requests for resetting network passwords must be made by the I.T. Liaison via email to the NCSC.
- Immediately inform the NCSC when log-in accounts are no longer required or will not be used for a period of 30 days or more.

System and Data Use

- Use is for County business only.
- Ensure vendors comply with security standards.
- Do not attempt to circumvent protection schemes or standards, or attempt to gain unauthorized access.
- Report any security vulnerabilities to the NCSC.
- Do not divulge log-in accounts, system process, data, or network information to unknown parties.
- Report any suspicious or illicit use to your department security coordinator.
- Ensure the physical security of system equipment and data.
- Use time-activated screensavers with password protection enabled.
- Log-off from the network when the work shift is completed, and turn off the workstation.
- Ensure only authorized staff maintain, move, or modify County systems, equipment, and network components.
- Do not connect modems to the network.
- Disconnect remote sessions (dial-in, Internet access, etc.) when remote task has been completed.
- Do not load or use unapproved software or data files on network connected systems.
- Comply with licensing requirements and copyright laws.
- Virus-check removable media before loading or installing the files.
- Do not disable virus-checking without authorization.
- Keep department supported systems current with security patches and updates.
- Ensure secure development practices are followed when creating programs or scripts.
- Assume all data is sensitive and confidential and protect it accordingly.
- Ensure all business-critical systems and data are backed-up.

Placer County Software List

Updated 1/01

Application/Operating Systems	Description	Vendor	Departments
ACT		Symantec Corporation	Economic Development
ArcServe	Network Backup	Computer Associates	County Wide
Automated Records Management	Tracking County Records	Info Technology Group	Administrative Services
Automated Procurement System	Old Procurement Application	Ambac Connect	Administrative Services
BarrSnar	Welfare Processing	EDS	Welfare
DMS	Bonds	Muni Financial	Treasurer
Business License	County Business License System	HDBL	Treasurer
Calendar Creator	Calendaring	The Learning Company	Building, Courts
CALJIC	California Jury Instructions		District Attorney
Charger	·	Sustain Technologies	District Attorney
Check Guard	Check Printing	Bottom Line	Auditor
CRIIS	Clerk Recorder Imaging System	AtPac	Clerk-Recorder
Crime Time		Crime Time	Probation
Crystal Reports	Database Report Writer	Seagate	County Wide
CUBS	Revenue Collection System	Columbia Ultimate Business Systems	Revenue Services
DAAssistant	District	Search Group	District Attorney
Data Keyes	Data Entry	Compute Keyes	Auditor
DBASE	Database Applications	Borland	Assessor
DMV Gateway	Access to Department of Motor	State of California	Assessor, Courts, Planning,
	Vehicles		Revenue Services, County
			Executive Office, Tax
			Collector
Drafix	AutoCad	AutoDesk	Assessor
EMS			Public Works
GIS	Geographical Information System	Hansen	Facilities, Public Works
G-Link	Terminal Emulator	Gallagher & Robertson	County Wide
Hartsoft	Dialing Software to RCA Credit	RCA	Revenue Services
	Bureau		
Heat	Ticket Tracking Application	Bendata	IT
HDL Sales Tax		Hinderlite de Llamas & Associates	Economic Development
HHS			
Hot Metal Pro	Web Design Application	SoftQuad	County Wide
Law Desk	Law Books on CD Tower	ETS	County Counsel, District
			Attorney, Probation, Sheriff
Lotus Notes	Calendaring	Lotus Corporation	CEO, Board of Supervisors,
			Admin Services
Megabyte System	Property Management System	MegaByte	Assessor, Auditor, Tax
			Collector

Application/Operating Systems	Description	Vendor	Departments
NetWare 4.11	Operating System	Novell	County Wide
NetViz	Network Mapping Application	NetViz	IT
Office Automation			County Wide
Microsoft Office		Microsoft	
GroupWise E-mail		Novell	
Netscape Communicator		Netscape	
Virus Scanning		MCA	
Auditing Software		BindView	
Paradox	Database Application	Borland	Assessor, Personnel
Payroll/Personnel	County Wide Payroll System	Infosol	Auditor, Personnel
Performance Accounting	County Wide Accounting System	KPMG	County Wide
Accounting			
Budgeting			
Purchasing	D 1 1 D 1 1 1		B 1
Probation	Probation Records Management	Tiburon	Probation
ProComm Plus	Dialing Application	Quarter Deck	IT
Proforma	Legal Forms	Legal Solutions	Courts, District Attorney,
			County Counsel
MS Project	Project Application	Microsoft	IT
Property Comparisons	Compares Sales Information between Counties		Assessor
Property Estimator		Marshall & Swift	Assessor
Q & A	Database Application	Symantec	Sheriff
Quicken	Reconciliation	Intuit	Auditor, Personnel
Risk Master	Database Application	Dorn Technologies	County Executive Office
CAD	911 Dispatch Application	Tiburon	Sheriff
CMS	Corrections Management System	Tiburon	Sheriff
RMS	Records Management System	Tiburon	Sheriff
Secure ID	Authentication for Dial In	Security Dynamics	County Wide
Sigma	Applicant Tracking System	Sigma Data Systems	Personnel
Sustain	Court Management System	Sustain Technologies	Courts
	District Attorney Case Management	2 2	District Attorney
	System		
SymPro		SymPro	Treasurer
Bank Of New York	Dialing Software	Bank of New York	Treasurer
Telemanagement Software	Telephone Billing	Telesoft	IT
VetPro	Veterans Database Application	Panosoft	Veterans Administration
Visio	Mapping/Drawing Application	Visio Corporation	IT
WestLaw	Dial out to West Law Publishing	WestLaw	County Counsel, District
			Attorney, Courts

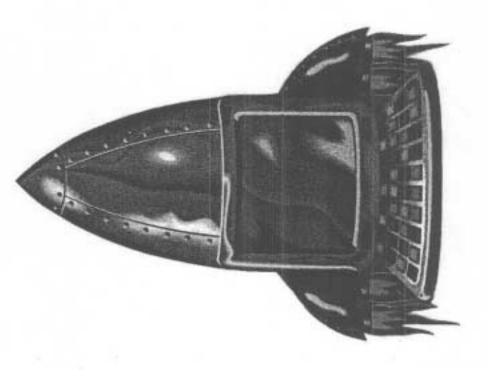
PLACER COUNTY DEPARTMENT OF ADMINISTRATIVE SERVICES

INFORMATION SYSTEMS MASTER PLAN "TELESERVICES"

PRESENTED TO: BOARD OF SUPERVISORS JANUARY 15, 1996

FELECOMMUNICATIONS AND COMPUTERS HAVE BECOME THE SAME TECHNOLOGY

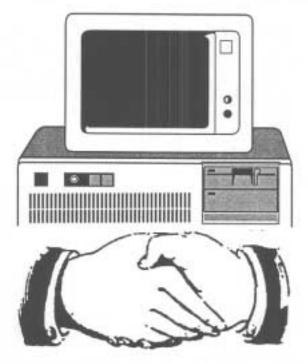
- Digital
- Integrated
- Authentic
- Ubiquitous



government potential to do more "Telecommunications offers local in less time at less cost for more people.

if they are willing to re-think their business practices by providing teleservices. - Mobile Governments: Local Access to the Superhighway, 1995

TELESERVICES

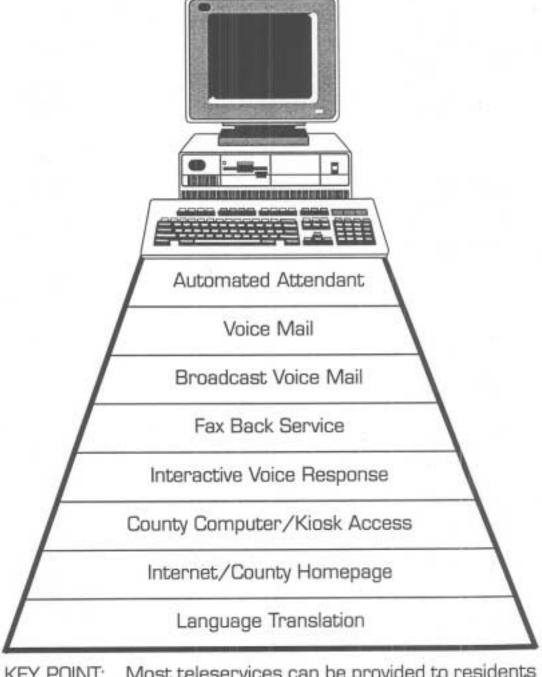


PUBLIC/PRIVATE INFORMATION ACCESS AND SHARING PARTNERSHIP WILL MATURE AND EXPAND

Teleservices will:

- Fundamentally change how local governments deliver services and conduct business
- Deliver many services to residents over a network rather than requiring them to travel to a government center
- Reduce transaction costs by having the resident involved in the transaction itself

TELESERVICES COMPONENTS



KEY POINT: Most teleservices can be provided to residents 24 hours a day.

COUNTY PUBLIC ACCESS/SERVICE CENTER MODEL **FUTURE VISION**

Machines Telephone/Voice IVR/Voice Trees Workstations Computer Fax Kiosks COUNTY INTERNET FIDMEPAGE GOUNTY DATA SYSITEM Individual Businesses Private Residences Community Based Service Centers ACCESS PUBLIC A C C U U G G Printers Video

PLAN 2000 – HIGH SPEED WIDE AREA NETWORK

MULTI-AGENCY HIGH SPEED ACCESS TO MISSION CRITICAL INFORMATION

Finance

Payroll/Personnel

Fixed Asset/Inventory

Bond Accounting Cost Accounting

- Accounting/Budgeting
- Property Treasury System

Criminal Justice

- Dispatch/911
 - Records
- Mobile Data Computers
 - Integrated Courts Jail Management
- Jury Management DA Criminal Case
- Probation Management MA Victim Witness

High Speed Wide Area Network

Windows

E-Mail

Spreadsheet Database

Public Ways

- Permits
 - 98
- Fleet/Fuel

Remote Access

Security

Imaging CD ROM

- Flood Management
 - Heavy Equipment
- Equipment Maintenance

Revenue

General Government

- Procurement
- Elections
- Recorder
- Telephone Management
 - Applicant Tracking
 - Library

Health and Human Services

- Welfare
- Child Welfare
- Medical Clinic
- Public Guardian Public Health
- Environmental Health
 - Medical Lab

POTENTIAL TELESERVICES APPLICATIONS

- County Services Directory
- Board Meeting Agendas/Minutes
- Committee/Commission Vacancies
- Public Issues Forum
- County Special Events/Notices
- Elections Information/Filings/Results
- Procurement Bidding/Contracting
- Permits Information/Application/Tracking
 - Property System Information
- Zoning Policy/Status
- Business License Application/Payment
 - Tax Information
- Records Access/Payment (Birth, Passports, etc.)
 - Collection of Fines/Fees

- Court Case Filing/Tracking Crime Reporting
- Jury Status/Instructions Probation Monitoring
 - Court Schedules
- **Emergency Services**
- Video Arraignment/Conferencing

Jail Visitation Information

- Sheriff's "Most Wanted"
 - Law Library

HHS Program Services and Applications

On-line Job Application and Tracking

Employment Process

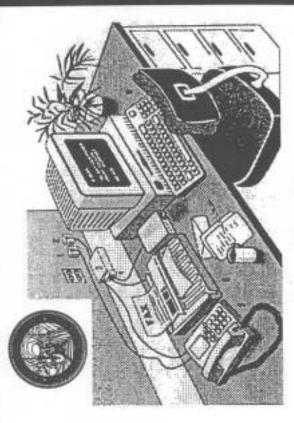
Job Line

Medical Clinic Services/Appointments

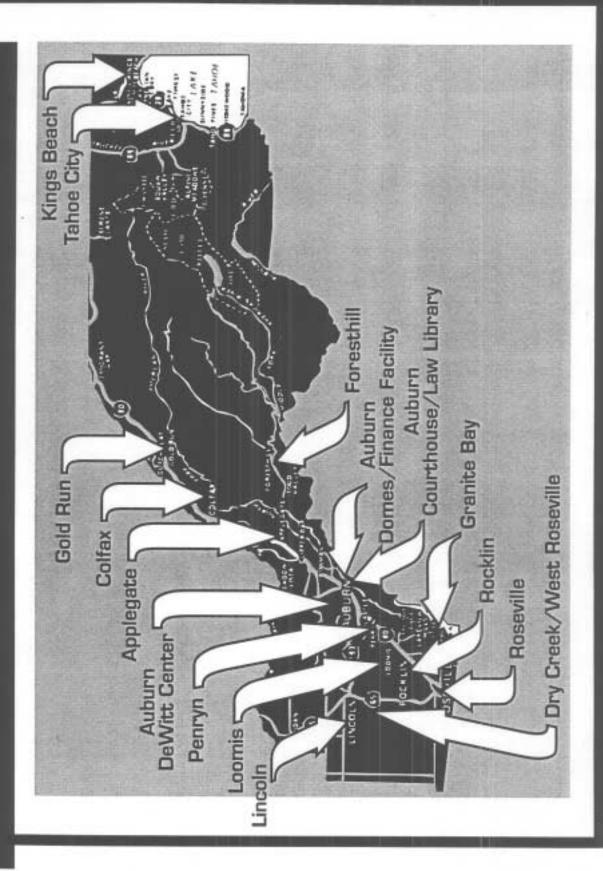
Parks and Recreation Information

County Financial Profile

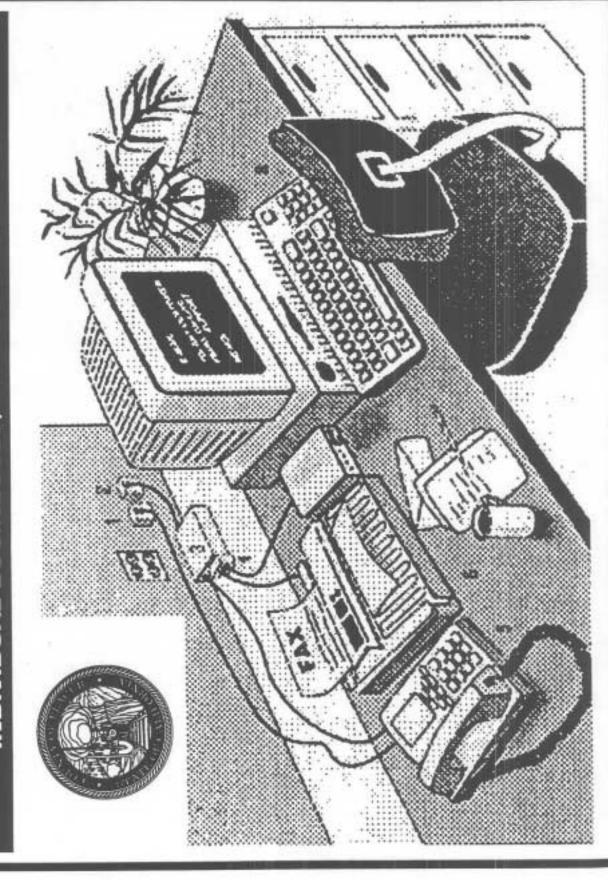
- Road Conditions
- Recycling/Refuse Information
- Economic Development/Business Guides



PLACER COUNTY NETWORK - PLANNED



PUBLIC ACCCESS/TELESERVICES CENTER BUSINESSES/PRIVATE RESIDENCES INDIVIDUAL PLACER COUNTY



R. F. P. NUMBER: 8818

RELEASE DATE: FEBRUARY 8, 2001

CLOSING DATE AND TIME: PROPOSALS SHALL BE SUBMITTED NOT LATER THAN 5:00 PM.

PST on March 7, 2001

ADDENDUM No. 1

1. This information is provided in response to questions asked at the vendor conference on Wednesday, February 21, 2001.

1.1. When will the vendor contract go to the Board of Supervisors?

The CEO's office plans to take the contract to the Board for approval at their meeting on Tuesday, March 20.

1.2. Does the CEO's office support this project?

Yes. The CEO issued the RFP and strongly supports it. The CEO Public Information Office manages the e-government project.

1.3. *Is the project timeline affected by external factors?*

Yes, the CEO staff will use information from the draft and final reports to help shape budget figures for FY 01/02. The sooner that information can be delivered, the more easily it can be incorporated into the budget process..

1.4. *Is it expected that the PowerPoint presentation on the final report will be prepared and delivered after the report itself is delivered, at the end of the 6-week period?*

Yes. Because the PowerPoint presentation will be on the final report, it must be prepared after the final report is complete. However, the CEO will need that presentation no later than one week after the final report is delivered. That means all work products for the contract will be delivered to the county seven weeks after the contract is signed.

1.5. How long will the county take to review the draft report before returning it to the consultant to prepare the final report?

County staff will review the draft report and return it with comments and suggestions no later than one week after receiving it.

1.6. With the 20-page limit on the proposal what sort of detail should be provided In project team member resumes?

Provide brief resumes which focus on specific prior experience and skills identified in the RFP.

1.7. Regarding the proposal evaluation criteria and describing the report methodology, are there priorities set for items 2.3. 1 through 2.3.8 in the RFP (e.g. identifying ADA issues, identifying the staff and financial resources needed to implement the

county's top e-government services priorities)?

While the proposal should address each of the items listed in section 2.3, the items are generally listed in priority order.

1.8. Will the successful bidder on this RFP be precluded from bidding on subsequent e-government services or consulting opportunities?

No, there is no provision like that in the RFP.

1.9. Will the county provide help in scheduling meetings with county staff related to this RFP?

Yes

1.10. Will all meetings take place in county facilities, or will the contractor need to arrange meeting facilities?

All meetings will be held in county facilities.

1.11. Will the vendor be conducting interviews with end users -- constituents or other vendors, for example -- about county e-government services?

No, for purposes of this study, the CEO's office and department heads and their staff will provide the expertise on county services delivery on behalf of their customers, the county's residents and others who do business with the county.

1.12. What's an example of a contingency, mentioned in Section 5?

An example of a contingency would be if a vendor included additional information in the proposal which wasn't explicitly identified in the RFP but which would enhance Placer County's planning and implementing e-government services. The vendor should identify the cost to include the additional information. The budget for the proposal remains in the \$50,000 to \$60,000 range, however.

1.13. How supportive is the Board of Supervisors and the CEO of this project?

The CEO's office issued the RFP and strongly supports the e-government project. The Board has been supportive of earlier online and services delivered using new technologies. For example, the Board approved the *IT 2000 Plan* in 1996, a portion of which addressed e-government services (then called "teleservices"). While the "teleservices" portion of the *IT 2000 Plan* no longer reflects current county thinking on e-government services, it was attached as background material to demonstrate the county's longstanding interest in e-government opportunities.

1.14. What are the county's definitions for the terms **e-government** and **extranet**?

E-government - a collective term for using new technologies like the Web, IVR, and wireless connectivity to deliver government services traditionally delivered by government staff in person, in government offices or facilities, or by phone. Some examples of e-government services, but by no means all, are listed in Section 2.3.1 of the RFP.

Extranet - a source of county government information and services (e.g. goods or services bid or proposal submission, land development plans submission) accessible via the Web or through IVR or wireless technologies for vendors and those doing business with the county which requires prior registration, and a user logon and password. County Information Technologies system design and security requirements and department needs will dictate county extranet design and requirements.

1.15. Who will attend the meetings mentioned in Section 2.2? Decision-makers?

The CEO staff will make every effort to have department heads or designated staff who can speak on their behalf and make department commitments attend the meetings.

1.16. Has money been allocated yet for implementing additional e-government services?

No. The information from the successful vendor's final report will be used to plan county financial and staff resource commitments for the next 24 to 36 months, starting with the budget cycle for FY 01/02.

1.17. *Is IVR included among anticipated e-government services?*

Yes.

1.18. *Is the "teleservices "material dated?*

Yes. It was part of the county's *IT 2000 Plan*, approved by the Board in 1996, and was included as an attachment to the RFP only as background material.

1.19. Regarding publishing county documents, in Section 2.3. 1, has the county selected a document management system?

The county is currently implementing a document image management system from vendor AtPac. The Clerk/Recorder/Registrar's office is leading the system implementation though other county departments plan to implement the system in their work in the near future. It uses Oracle as its database and stores images in the TIFF format. The CEO expects county departments to use this document imaging system unless they are required to use another system by an external agency.

However, by "publishing," the county also means publishing online versions of print newsletters, brochures, and other publications meant for public use, not just legal and other documents managed by the imaging system.

1.20. *Is there a preferred format for the final report?*

The recommended report format is outlined in section 2.5.2. Present findings, recommendations, etc., for each of the aspects of various e-government tools (e.g. the Web, IVR, an intranet) listed, such as operational, and organizational and staffing concerns.

1.21. Are IT staff going to be conveniently available to the vendor during the 6-week work period? Yes. 1.22. Would the county welcome information on possible sources of external funding for e-government services? Yes. Additional information of possible interest to consultants: To help the consultant identify specific department needs and county priorities, the CEO staff, and IT, is compiling a draft list of e-government services from all 24 county departments. The successful consultant will receive that list, in the county's overall order of priority, upon starting work on the project. The CEO staff, with IT assistance, expects to add to or amend the list based on the results of the facilitated department heads' meetings to be conducted by the consultant. 2. Section 9.3 Evaluation Criteria is amended as follows: **Evaluation Criteria:** Weight **Oualifications:** 30% • Firm (Section 6.3) • Employees (Section 6.6) • Sub-consultants (Section 6.7) Experience: 30% • Successfully completed projects (Section 6.4) • References (Section 6.8) • Knowledge of county government and organization (Sections 6.4 and 6.6) Methodology: 30% • Work plan (Section 6.5) • Schedule (Section 6.5) • Dependence on sub-consultants (Section 6.7) 10% Cost – within estimated budget 100% Total All other terms and conditions of the RFP remain the same. The addendum shall be signed and returned with the proposal submittal. Firm

Updated 02/26/2001

Signature

Authorized Representative - Name and Title